

Save time, switch online using the Super SA member portal.

Please complete this form in BLOCK LETTERS using a BLACK PEN and return the form by scanning and emailing or mailing.

INVESTMENT SWITCHING

Use this form to make changes to your Triple S or Flexible Rollover Product (FRP) investment options.

Account ID

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You can change your investment option(s) for your current account balance and/or future contributions or rollovers at any time. This is called an investment switch. If you are an FRP investor, you may not switch investment options until seven business days have elapsed from opening your account or investing additional funds in excess of \$5,000 (by rollover, contribution or other method).

You should seek professional financial advice before switching options, to assist you in choosing the investment option(s) that best suits your needs.

Your super can be invested between any number of the available investment options providing the total is equal to 100%. You can nominate different combinations of investment options for your current account balance and your future contributions. Please use whole percentages only.

The first switch in any financial year is free. Any further switches in the same financial year will incur a fee. This fee will be deducted from your super account. There is no fee for redirecting future contributions.

Step 1 - Complete Personal Details

Mr Ms Miss Mrs Dr Prof

Surname

Given name(s)

Residential address

Postcode

Postal address (if different from above)

Postcode

Date of birth / /

Email*

Contact number*

Name of employer

Employee number

*By providing your email address and/or telephone number(s) you are agreeing to receive, from Super SA, or an organisation on behalf of Super SA, marketing communications including newsletters, announcements, invitations or surveys. You may opt out of these marketing communications at any time by updating your communication preferences in our online member portal or by contacting Super SA. If you opt out of marketing communications, you will still receive any important account information from us.

Contact Us

By Appointment:
Ground floor, 151 Pirie Street
Adelaide SA 5000

Call: 1300 369 315

Email: supersa@sa.gov.au

Postal: GPO Box 48, Adelaide, SA 5001

Website: supersa.sa.gov.au

Please Note

You must complete all sections of this form. Only use whole percentages and ensure the totals equal 100%.

Please sign the member declaration on the final page.



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Switching Timeframes.

Current Account Balance

The unit price(s) applied to a switch of your current account balance will represent the market value(s) of investment option(s) calculated after the switch request is received.

A request to switch your current account balance investment option(s) that is received before 5pm on a business day will generally take effect on the third business day following the date of receipt. The unit price will reflect the market valuation at close of business of the day you requested the switch. Check the Super SA website for any variation to this.

If you change your mind and wish to stop an investment switch going ahead, you will need to let us know in writing by 5pm on the day your switch is lodged otherwise it will proceed.

Future contributions and rollovers

A switch made to future contributions and rollovers will take effect from the time it is processed.

Step 2: Choose your Product

(Select one of the options below)

Triple S

Flexible Rollover Product

Important

If you have a Triple S and an FRP and wish to change both, you will need to complete two separate forms.

Step 3: Choose your investment options

(Select one of the options below)

I elect to change my current account balance investment options. This affects how the money currently in your account is invested. (Only complete "Investment allocation percentage" column below)

I elect to change my future contribution investment options. This affects how any future payments (employer contributions, member contributions and any rollovers) are invested once the switch, via this form, has come into effect. (Only complete "Investment allocation percentage" column below)

Both of the above. This affects how the money currently in your account and how any future payments are invested. (If you would like your current account balance and your future investment payments to differ please complete **both** columns).

You can choose one or more investment options in any percentage. Please ensure that the total adds to 100% otherwise this form will not be processed and your investment allocations will remain unchanged.

Investment option	Investment allocation percentage	(OPTIONAL) Complete this column if you want your future contributions invested differently to your current account balance
High Growth	%	%
Socially Responsible	%	%
Balanced	%	%
Moderate	%	%
Conservative	%	%
Capital Defensive	%	%
Cash	%	%
Total (must equal 100%)	=100%	=100%

Member Declaration

I declare that the information I have provided on this form is true and correct and understand that:

- The unit price for the investment option(s) I have elected on this form may be more or less than was quoted at the time of making this election.
- I am responsible for the investment option I have chosen and I am aware of the consequences of making such an election.
- I am aware that a fee of \$20 will be charged on second and subsequent switches in the financial year.
- There is no cost for redirecting future contributions.
- I have read the switching information section of this form, and understand the terms and conditions of making an investment switch. I am aware that more information can be found in the Product Disclosure Statement and Investment fact sheet on the Super SA website.
- I am aware that past performance is not a reliable indicator of future performance.

Signature: 

Date: / /