Change a Member's Investments (Financial Adviser)

Super SA

Government of South Australia

Triple S / Flexible Rollover Product / Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

To find out more visit **supersa.sa.gov.au** or call **1300 369 315**

This form is to allow Financial Advisers to change the investments held by a member.

Client ID:

1. Personal details

Title

Date of birth
D D / M M / Y Y Y Y

Given Name(s)

Family Name

Email address[1]

Mobile phone[1]

Work phone

Home phone

Street address

Suburb

State

Postcode

Postal address *(if different from above)*

Suburb

State

Postcode

[1]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 important account information from us.

2. Financial Adviser details

Financial Adviser Name

Name of Business

Adviser email

Adviser contact number

AFSL number

ASIC Financial adviser representative number

MFL0020

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3. Select client's scheme

Please change the following schemes investment option/s:

Use separate forms for each scheme you are making changes.

- ☐ Triple S *(complete section 4 and 5)*
- ☐ Flexible Rollover Product (FRP) *(complete section 4 and 5)*
- ☐ Income Stream *(complete section 4 and 6)*

Please note: 'Stable' investment was previously named 'Conservative'.

4. Change current investments (All schemes)

Please change the current balance to be invested as follows:

Use whole percentages.

High Growth	%	Moderate	%	Cash	%
Socially Responsible	%	Stable	%	**TOTAL**	**= 100 %**
Balanced	%	Capital Defensive	%		

5. Change future contributions investments (Triple S & FRP only)

Please change future contributions into selected scheme to be invested as follows:

Use whole percentages.

High Growth	%	Moderate	%	Cash	%
Socially Responsible	%	Stable	%	**TOTAL**	**= 100 %**
Balanced	%	Capital Defensive	%		

6. Change the withdrawal order (Income Stream only)

Please change the draw down order for all future withdrawals as follows:
(number ALL the boxes 1 through 7, with 1 being the investment to be withdrawn first.)

Cash		Moderate		Socially Responsible	
Capital Defensive		Balanced		High Growth	
Stable					

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7. Financial Adviser Authority

To allow the financial adviser listed in section 2 to receive information regarding this investment switch within my account, I request and consent to give my financial adviser access to my account information and understand that:

- once access is granted, my financial adviser and/or their staff will only be able to obtain information on my account relating to this switch.
- this authority is limited to the investment switch within this form
- my financial adviser is not able to make changes to my account.
- should I wish to allow my financial adviser access to receive information beyond this investment switch, I will complete a "Authority to release information to a third party" form

8. Member declaration

- I declare the information supplied on this form is true and correct.
- I acknowledge that I've read and understood the information in the relevant Investment Guide (available at supersa.sa.gov.au) and I understand that:
  - Investing in an investment option involves some risk and on occasion my account balance may decrease and accept responsibility for my selection.
  - Super SA doesn't guarantee my investment or any rate of return.
  - 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.
  - The unit price applied to a switch will represent the market value of an investment option calculated after the switch is received.
  - Past performance is not a reliable indicator of future performance.
  - A request to switch your account balance that is received before 5pm on a business day will generally take effect on the third business day following the date of receipt.
  - No additional investment switches can be processed online until the previous investment switch has been completed, for more information please contact Super SA.

Signature ✗ ____________________ Date DD / MM / YYYY

9. Financial Adviser Declaration

By signing the below, I confirm and declare that:

- The change to investment exposures, risks and fees has been explained to the above listed member.
- I have provided the member with the relevant investment guide.

Financial Adviser Name ____________________

Signature ✗ ____________________ Date DD / MM / YYYY

Please note: Section 8 and 9 must be signed for this investment change to be processed by Super SA.