

Change your investments - Retirement Income and Transition to Retirement Income



About this form

You can use this form to change your investment mix for your existing account balance and nominate how your regular income payments are to be drawn from your chosen investment options. You can also do this by logging into your account at csf.com.au. Information about Catholic Super's investment options is available online and in our *Product Disclosure Statement (PDS)*. If you're unsure of your decisions, we recommend that you see a licenced financial adviser.

1 – Your member details

Please complete in pen using CAPITAL letters

Member number

Title

Mr Mrs Ms Miss Other

Sex

Male Female

Date of birth (ddmmyyyy)

First name

Last name

Postal address (must be provided)

Suburb

State

Postcode

Country (if not Australia)

Business hours phone

After hours phone

Mobile

Email

Your investment choice options

What do you want to do?

- Change options for my existing account balance > **Complete steps 2 and 4**
- Change options for my income payment drawdowns > **Complete steps 3 and 4**
- Change options for both my existing account balance and my income payment drawdowns > **Complete steps 2, 3 and 4**

Need help?



1300 655 002



csf.com.au



Catholic Super, GPO Box 4303, Melbourne VIC 3001

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2 – Your investment choice

I would like to invest my account in the **MyPension investment strategy** (not applicable for Transition to Retirement Income accounts) (proceed to step 4)

I would like to invest my account in the following investment option(s):

Diversified options		Sector Specific options	
Growth Plus	<input type="text"/> %	Australian Shares	<input type="text"/> %
Growth	<input type="text"/> %	Overseas Shares	<input type="text"/> %
Balanced Growth	<input type="text"/> %	Diversified Fixed Interest	<input type="text"/> %
Balanced	<input type="text"/> %	Cash	<input type="text"/> %
Capital Stable	<input type="text"/> %		
Future Focus	<input type="text"/> %		
Index Diversified	<input type="text"/> %		

Must total 100%

3 – Your income payment drawdown options

Only complete this section if you have nominated your own investment mix above and you have chosen 2 or more investment options. If you do not make a choice below or if your choices below do not equal 100%, we will pay your income payments using the proportional method.

Proportional – Income Payments are drawn in proportion to the balance in each option at the time of withdrawal, which may change over time.

Nominated option/s – You can specify the percentage to be withdrawn from each investment option below. (When there's no longer enough money in your chosen options, income payments will be deducted using the proportional method.)

Diversified options		Sector Specific options	
Growth Plus	<input type="text"/> %	Australian Shares	<input type="text"/> %
Growth	<input type="text"/> %	Overseas Shares	<input type="text"/> %
Balanced Growth	<input type="text"/> %	Diversified Fixed Interest	<input type="text"/> %
Balanced	<input type="text"/> %	Cash	<input type="text"/> %
Capital Stable	<input type="text"/> %		
Future Focus	<input type="text"/> %		
Index Diversified	<input type="text"/> %		

Must total 100%

Effective date

If we receive your request to change your investment options prior to 4pm AEST/AEDT on a business day, the change will be effective using the unit prices applied for that day. If the request is received after 4pm AEST/AEDT on a business day, the change will be effective the following business day

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Privacy

The personal information you provide on this form will be used in accordance with Together Trustee's Privacy Statement, which you can view online at csf.com.au/privacy or you can obtain a copy by contacting us on **1300 655 002**.

Together Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

Our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer), will also handle your personal information. You can view Mercer's Privacy Policy online at mercerc.com.au/privacy

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

4 – Sign the form

By signing this form I:

- confirm that I have read and understood the form including the information about when my change will be effective.
- understand the information on this form will be used to process my investment choices.
- understand that if my account is currently invested in the MyPension investment strategy, Catholic Super will no longer automatically rebalance my account according to the MyPension investment strategy arrangements if I have chosen to nominate my own investment mix or to change my income payment drawdown options on this form.
- acknowledge that Catholic Super will not action my request if the information is incomplete or ambiguous.

Signature

Date (ddmmyyyy)

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Please return your completed form to Catholic Super, GPO Box 4303, Melbourne Vic 3001.

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