

Switch Investments in an Income Account includes Transition to Retirement (TTR)

When to use this form

Use this form to change the investment strategy in your Income account, or the investment options your payments are taken from. You can also do this by going to the Investment section of Member Online, at memberonline.qsuper.qld.gov.au

Requests to change your investment option(s) for your existing account balance received by 3pm AEST on a business day will be processed using the valuation date unit price. Requests received after 3pm AEST on a business day, or at any time on a non-business day (weekends or national public holidays) will be processed using the valuation date unit price for the next business day.

Processing of the transaction will generally be completed two days after receipt

Please complete this form in **BLOCK** letters, in blue or black ink.

1 Personal details

Client number

You can find your client number on your annual statement or by logging in to Member Online.

Title

First name/s

Last name

Previous name¹

(Optional – only if we still use your previous name)

Date of birth (dd/mm/yyyy) (mandatory)

Home phone number

Mobile phone number

Work phone number

Email address

Residential address (mandatory)

State

Postcode

Postal address

☐ As above

State

Postcode

2 Income account to switch investments for

If you have more than one Income account, please tell us which Income account you want to switch investments for.

☐

Income account number

OR

☐

All of my Income accounts.



Part of Australian Retirement Trust

¹ If you've changed your name, please attach certified copies of either a marriage certificate or other legal change of name document.

3 Investing your current balance

This is where you tell us how you'd like your current balance invested. You'll find more information about these options in our Product Disclosure Statement for Income Account and Lifetime Pension. You can download this at qsuper.qld.gov.au/pds or call us and we'll send you a free copy.

Investment option	Allocation	Investment option	Allocation
High Growth	<input type="text"/> %	Australian Shares Index	<input type="text"/> %
Balanced	<input type="text"/> %	International Shares Hedged Index	<input type="text"/> %
Conservative -Balanced	<input type="text"/> %	International Shares Unhedged Index	<input type="text"/> %
Conservative	<input type="text"/> %	Listed Property Index	<input type="text"/> %
Balanced Risk-Adjusted	<input type="text"/> %	Unlisted Assets	<input type="text"/> %
Socially Conscious Balanced	<input type="text"/> %	Bonds Index	<input type="text"/> %
High Growth Index	<input type="text"/> %	Cash	<input type="text"/> %
Balanced Index	<input type="text"/> %	Total* (must add up to 100%)	<input type="text"/> %

For members in our closed Self Invest option, we can't make payments directly into Self Invest. To transfer money into and out of Self Invest, log in to Member Online.

4 Your payment preference

Tell us which of your chosen investment options your income payments and withdrawals should be taken from. Choose either:

- ☐ **Order of priority (see below):** We'll make deductions from one nominated investment option first and when there's no money left in that option, we'll move to the next investment option you've nominated.
- OR
- ☐ **Percentage (see below):** You can nominate a percentage to be taken from your investment options for each payment. Your nomination total must equal 100%.

If you don't tell us what your payment preference is, we'll keep it the same as your existing payment preference. You can find or change your current payment preferences in Member Online.

Investment option	Order of priority (e.g. 1, 2)	OR	Percentage
Diversified options			
High Growth	<input type="text"/>	or	<input type="text"/> %
Balanced	<input type="text"/>	or	<input type="text"/> %
Conservative-Balanced	<input type="text"/>	or	<input type="text"/> %
Conservative	<input type="text"/>	or	<input type="text"/> %
Balanced Risk-Adjusted	<input type="text"/>	or	<input type="text"/> %
Socially Conscious Balanced	<input type="text"/>	or	<input type="text"/> %
High Growth Index	<input type="text"/>	or	<input type="text"/> %
Balanced Index	<input type="text"/>	or	<input type="text"/> %
Asset class options			
Australian Shares Index	<input type="text"/>	or	<input type="text"/> %
International Shares Hedged Index	<input type="text"/>	or	<input type="text"/> %
International Shares Unhedged Index	<input type="text"/>	or	<input type="text"/> %
Listed Property Index	<input type="text"/>	or	<input type="text"/> %
Unlisted Assets	<input type="text"/>	or	<input type="text"/> %
Bonds Index	<input type="text"/>	or	<input type="text"/> %
Cash	<input type="text"/>	or	<input type="text"/> %
Total (must add up to 100%)			<input type="text"/> %

For members in our closed Self Invest option, we can't make payments directly into Self Invest. To transfer money into and out of Self Invest, log in to Member Online.

5 Checking your attachments

- ☐ **If you've changed your name**, you'll need to attach certified copies of either your marriage certificate or other legal change of name document. If your name has changed and you work for the Queensland Government or related entity employer, let your payroll office know and they will tell us.
- ☐ **If you're signing as a power of attorney**, you'll need to attach your power of attorney documentation. You must also complete proof of identity requirements for you and the member (read the Proof of Identity factsheet for more details).

6 Declaration and authorisation

- I'm the person named on this form, or have a power of attorney to act on the member's behalf.
- The information I've given on this form is true and correct.
- I understand that from time to time Australian Retirement Trust Pty Ltd may suspend unit prices and switching, and information on this is available on the QSuper website.
- I understand QSuper may contact me if the instructions I've given on this form are unclear, and my switch will only be processed when a valid instruction is received.

Name

Signature

Date signed (dd/mm/yyyy)

 / /

Send your completed form to us at QSuper by:

Post: QSuper
GPO Box 200
Brisbane Qld 4001

Email: qsuper@qsuper.qld.gov.au

Member Centres

Visit qsuper.qld.gov.au/membercentres
for locations

Member Services team

Phone 1300 360 750
Overseas +61 7 3239 1004
Monday to Friday 8.00am – 6.00pm (AEST)

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