

Switch Investments in an Income Account

includes transition to retirement (TTR)

When should I use this form?

We've made it really easy for you to change the investment strategy in your Income account, or the investment options your payments are taken from. Just go to the Investment section of Member Online, or fill out this form and we'll take care of the rest.

Your investment switch becomes effective from the day we receive your notification. The exception is if it's received after 3pm (Queensland time) or on a Brisbane non-working day (weekends or Brisbane public holidays). If that's the case, we'll process the switch as if it was received the following Brisbane working day.

The unit price we'll apply to your switch will be the price it is two working days after we receive your valid request.



1

Personal details

Your client number can be found on your annual statement or by logging in to Member Online.

Client number

Title

Given names

Surname

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy)

Home phone number

Mobile phone number

Work phone number

Email address

Residential address

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.

3

Investing your current balance

This is where you tell us how you'd like your current balance invested. You'll find more info about these options in our *Investment Choice Guide*. Just head to qsuper.qld.gov.au or call us and we'll send you a copy. You can also play around with the calculators section on our website to help choose an investment strategy that's right for you.

Investment option	Percentage	Investment option	Percentage
Moderate	<input style="width: 40px;" type="text"/> %	Cash	<input style="width: 40px;" type="text"/> %
Balanced	<input style="width: 40px;" type="text"/> %	Diversified Bonds	<input style="width: 40px;" type="text"/> %
Socially Responsible	<input style="width: 40px;" type="text"/> %	International Shares	<input style="width: 40px;" type="text"/> %
Aggressive	<input style="width: 40px;" type="text"/> %	Australian Shares	<input style="width: 40px;" type="text"/> %
Total <small>(must add up to 100%)</small>			<input style="width: 40px;" type="text"/> %

We can't make payments directly into Self Invest. To transfer money into and out of Self Invest, just visit qsuper.qld.gov.au and log in to Member Online.

¹ If you've changed your name you'll need to give us certified copies of either a marriage certificate or other legal change of name document.

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4 Your payment preference

Let us know which of your chosen investment options your income payments and withdrawals should be taken from, as either:

- **Order of priority:** 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.
- **Percentage:** You can nominate a percentage to be taken from your investment options for each payment. Your nomination total should equal 100%.

If you don't let us know what your payment preference is, we'll keep it the same as your existing payment preference. You can find out your preference and change it in Member Online.

Investment option	Order of priority (eg 1,2)	OR	Percentage	
Moderate	<input type="text"/>	OR	<input type="text"/> %	
Balanced	<input type="text"/>		<input type="text"/> %	
Socially Responsible	<input type="text"/>		<input type="text"/> %	
Aggressive	<input type="text"/>		<input type="text"/> %	
Cash	<input type="text"/>		<input type="text"/> %	
Diversified Bonds	<input type="text"/>		<input type="text"/> %	
International Shares	<input type="text"/>		<input type="text"/> %	
Australian Shares	<input type="text"/>		<input type="text"/> %	
Total (must add up to 100%)			<input type="text"/> %	

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5 Finding your other super

If we have your TFN, we can use it to find any other super you may have. This could include lost super, other active accounts and any other money held by the ATO. If we find any other super, we'll write to you to see if you want us to consolidate it into your QSuper account. And don't worry if you change your mind, just call, write or email us to let us know.

- I want QSuper to find my other super.

6 Checking your attachments

Not sure what evidence we need or how to get certified copies? Check our *Proving Your Identity* factsheet. Just head to qsuper.qld.gov.au or call us and we'll send you a copy.

- **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'll then let us know.
- **If you're signing as a power of attorney, you'll need to attach your power of attorney documentation** if you haven't already given it to us.

7 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 the QSuper Board of Trustees 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 (dd/mm/yyyy)

Please send your completed form to:
GPO Box 200, Brisbane, QLD 4001



Member Centres 70 Eagle Street Brisbane and 63 George Street Brisbane
Telephone 1300 360 750 (+617 3239 1004 if overseas)
Monday to Thursday 8:30am to 5:00pm AEST
Friday 9:00am to 5:00pm AEST

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