

# 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](https://memberonline.qsuper.qld.gov.au)

Your investment switch becomes effective from the day we receive your request. If we receive it after 3pm (Queensland time), or on a Brisbane non-working day (weekends or Brisbane public holidays), we'll process the switch the next Brisbane working day.

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

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 name<sup>1</sup>  
(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.

## 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](https://qsuper.qld.gov.au/pds) or call us and we'll send you a free copy.

Investment option	Allocation	Investment option	Allocation
Moderate	<input type="text"/> %	Cash	<input type="text"/> %
Balanced	<input type="text"/> %	Diversified Bonds	<input type="text"/> %
Socially Responsible	<input type="text"/> %	International Shares	<input type="text"/> %
Aggressive	<input type="text"/> %	Australian Shares	<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.

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



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#### 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
Moderate			<input type="text"/> %
Balanced			<input type="text"/> %
Socially Responsible			<input type="text"/> %
Aggressive			<input type="text"/> %
Cash	OR		<input type="text"/> %
Diversified Bonds			<input type="text"/> %
International Shares			<input type="text"/> %
Australian Shares			<input type="text"/> %
<b>Total</b> (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 attach certified copies of your and the member's identification documents.

#### 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](mailto:qsuper@qsuper.qld.gov.au)

#### Member Centres

Visit [qsuper.qld.gov.au/membercentres](https://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)

**Postal address** GPO Box 200, Brisbane QLD 4001  
**Email** [qsuper@qsuper.qld.gov.au](mailto:qsuper@qsuper.qld.gov.au)  
**Fax** 1300 242 070  
**Website** [qsuper.qld.gov.au](https://qsuper.qld.gov.au)

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