



## ANZ Australian Staff Superannuation Scheme

# Changing your investment options

You can change how your super is invested in the ANZ Australian Staff Superannuation Scheme. Simply choose from the investment options available to you as shown in your Product Disclosure Statement or other documentation provided in relation to investment choice.

If your choice is incomplete or ambiguous in the opinion of the Trustee, your request will not be actioned. You will be advised if this is the case.

You can use this form to change the investment option(s) for your existing account balance and any future cashflow to your account.

You can also submit your change electronically via the secure section of the Scheme's website [www.anzstaffsuper.com](http://www.anzstaffsuper.com) – under the 'Your Investments' tab or call ANZ Staff Super on **1800 000 086** to request a change.

You may have accounts in more than one Section of the Scheme if, for example, you have an employee member account in the Employee Section and a Transition to Retirement Account Based Pension in the Retirement Section. **If you have more than one account, you will need to complete a separate Changing your investment options form for each account.**

If you don't know which Section your account is in, log into the secure section of the Scheme's website [www.anzstaffsuper.com](http://www.anzstaffsuper.com) using your member number and PIN and check in "Your personal details" or call ANZ Staff Super on **1800 000 086**.

If you're unsure of your decision we recommend that you consult a licensed or appropriately authorised financial adviser.

### If you need help

For assistance call ANZ Staff Super on **1800 000 086** or refer to [www.anzstaffsuper.com](http://www.anzstaffsuper.com).

## Step 1 – Complete your personal details

Please print in black or blue pen,  
in uppercase, one character per box.



Title	Mr <input type="radio"/>	Mrs <input type="radio"/>	Ms <input type="radio"/>	Miss <input type="radio"/>	Other <input type="text"/>	Date of birth	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names	<input type="text"/>													
Surname	<input type="text"/>													
Postal address	<input type="text"/>													
Suburb	<input type="text"/>							State	<input type="text"/>		Postcode	<input type="text"/>		
Daytime Telephone	<input type="text"/>					Mobile	<input type="text"/>							
E-mail	<input type="text"/>													
Membership number	<input type="text"/>													



## Step 2 – Nominate which account your change in investments request applies to

This investment switch request applies to my account in the  Section.

## Step 3 – Choose your investment options for your existing account balance

You can choose one or a combination of the four investment options<sup>#</sup>. Please ensure that all the percentages add to 100%.  
At the next Switch Date\* I wish to have my existing account balance invested as follows:

	Percentage to be invested
Aggressive Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Cautious	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b>	1 0 0

## Step 4 – Choose your investment options for future cashflow

You can choose one or a combination of the four investment options<sup>#</sup>. Please ensure that the percentages add to 100%.  
At the next Switch Date\* I wish to have future cashflow applied to my investments in the Scheme as follows:

in the same option(s) as indicated above (Step 3)

OR

	Percentage to be invested
Aggressive Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Cautious	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b>	1 0 0

\* If your *Changing your investment options* form is received before close of business Thursday, the switch will become effective from the following Wednesday or the next available business day if it is a public holiday ("Switch Date"). If your *Changing your investment options* form is received after close of business Thursday, the switch will become effective from the next Switch Date.

<sup>#</sup> If you are currently classified as a MySuper member and therefore 100% of your account balance is invested in the Balanced Growth investment option (i.e. the default investment option), any request to change to another investment option will mean that you will be classified as a Choice member from the Switch Date\*. For further details, refer to the Product Disclosure Statement applicable for your section of membership of the Scheme.



## Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The Scheme Administrator, Mercer, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account in the Scheme and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential, but may be disclosed by the Trustee or Scheme Administrator to third parties, such as the Scheme's actuary, insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Superannuation Complaints Tribunal. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' inquiries or complaints.

Members' personal information may be disclosed to related entities of the Scheme Administrator located overseas (in particular, its wholly owned Global Operations Shared Services function in India) as part of the day-to-day provision of administration services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super  
GPO Box 4303  
Melbourne VIC 3001  
Telephone: 1800 000 086  
Facsimile: 03 9245 5827  
Email: [anzstaffsuper@superfacts.com](mailto:anzstaffsuper@superfacts.com)

The Trustee's Privacy Policy Statement is available on the Scheme's website [www.anzstaffsuper.com](http://www.anzstaffsuper.com) or from ANZ Staff Super by calling 1800 000 086. You can also access the Scheme Administrator's privacy policy on the Scheme's website.

## Step 5 – Sign the form

By signing this form I understand that:

- if my form is received before close of business Thursday, the switch will become effective from the following Wednesday or the next available business day if it is a public holiday ("Switch Date"). If my *Changing your investment options* form is received after close of business Thursday, the switch will become effective from the next Switch Date.
- the Trustee's administrator will not action my request if the information or investment choice is incomplete or ambiguous
- the information on this form will be handled by the Trustee and administrator to process my investment option choice
- the Trustee reserves the right to delay processing of my switch request
- the Trustee of the ANZ Australian Staff Superannuation Scheme is not responsible for my choice of investment strategy and does not guarantee the performance of the investment options
- this *Changing your investment options* form supersedes any previous instructions regarding my investment choice(s) for this account and I understand that I can switch my investment choice in the future by submitting another form or electronic switch request
- if I am currently classified as a MySuper member, making this investment switch will mean that I will be classified as a Choice member from the Switch Date
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

/   /

**Please return your completed form to: ANZ Staff Super  
GPO Box 4303  
Melbourne VIC 3001**

**Emails and faxes cannot be accepted.**

