

## Investment switch form (existing balance) - Pension

### Instructions

You should not complete this form unless you have received, read and understood the current Bank First Pension Product Disclosure Statement (PDS).

**You must complete a separate Investment Switch Form for each account you have in the fund.**

- Please print neatly in BLOCK LETTERS and use a BLACK pen.
- Print X in the appropriate boxes.
- Make sure you read all the instructions before you complete this declaration.

**Please send us your completed form by ONE of the following methods:**

**Email:** bankfirst@cubsuper.com.au    **Post:** Bank First Pension  
PO Box 541,  
Chatswood NSW 2057

Please note: if you email the form, there is no need to send us the original.

### Step 1 – Member details

Account number

Title

First name

Last name

Email address (mandatory requirement)

Date of birth

Phone number (mobile)

### Step 2 - Investment choice (switch existing balance only\*)

#### How would you like your existing money invested?

Bank First Pension offers 5 investment options to select how your funds are invested. If an Investment Option is not chosen we cannot accept your application.

Please refer to the PDS on the Bank First website at [www.bankfirst.com.au](http://www.bankfirst.com.au) for more information on investment options or contact us on 1300 654 193 for a copy.

**\*Note:** Your existing balance is your balance as at the date this form is processed.

I would like to invest in:

#### Choose your own mix

|                      |   |                     |
|----------------------|---|---------------------|
| <input type="text"/> | % | Cash Plus Option*   |
| <input type="text"/> | % | Conservative Option |
| <input type="text"/> | % | Balanced Option     |
| <input type="text"/> | % | Growth Option       |
| <input type="text"/> | % | High Growth Option  |

Total must equal 100%

\* Note: We've called this option 'Cash Plus' because it invests in Fixed Interest assets as well as Cash.

### Step 3 – Authority

- I have received, read and understood the current Product Disclosure Statement and request that my existing balance be invested as shown on this application.
- I understand the information in the Product Disclosure Statement relating to the redemption of investments and allocation of investment earnings where an investment switch is made.
- I acknowledge that the Trustee will invest my superannuation in accordance with my instructions set out in this application but that the Trustee reserves the right not to do so where necessary or appropriate.
- I understand that the Trustee is not responsible for my choice and I accept the investment risks, fees and costs, and rewards of the investment options I choose.
- I understand that any change to my investment strategy will be processed as quickly as possible and that there may be delays in processing any change to my investment strategy if I have not properly completed this form. I understand that my changed investment strategy will apply as at the date my request is processed.

Signature

Date