

Change investment option allocation form

Please complete this form in BLOCK LETTERS. **Questions?** Contact us on **1800 816 575** or **service@supermanagers.com.au**.

Did you know?

You can make a change to your investment allocation online at enterpriseplan.com.au by logging into the Member Online and changing your allocation in the Super Investment Allocation tab.

Important information

- Use this form to change the allocation of your existing account balance **AND/OR** the allocation of your future contributions. Before you complete this form, you should have read the Enterprise Investment Guide Product Disclosure Statement, which explains the strategy of each of the investment choices.
- We will send you written confirmation within 30 days of receiving your completed form. If you do not receive confirmation, please contact us on 1800 816 575.
- Unit prices are calculated daily so your investment allocation change will occur at the unit price on the last business day in which we receive your completed form. Please note there are no switching fees applicable.

1 Enterprise Plan member details

Account Number

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Date of Birth

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Title

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Given name(s)

--

Surname

--

Postal address

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State

--

Postcode

--

--

Residential address (if same as postal address write 'as above')

--

State

--

Postcode

--

--

Phone (home)

--

Phone (work)

--

Mobile

--

Email

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I authorise Enterprise Plan to update my address and contact details if the details provided above differ to the details.

The information in this document has been prepared by OneVue Super Services Pty Ltd ABN (74 006 877 872), AFSL 246883 as the Fund Administrator. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation and needs. Before making any decisions regarding your benefits in **Enterprise Plan sub Fund of the Executive Super Fund** ABN 60 998 717 367 (the Fund) it is important that you consider the current Product Disclosure Statement (PDS) relevant to your category of membership having regard to your own situation and needs. Copies of the various PDS' are available on the Enterprise Plan's website enterpriseplan.com.au. You should consult a licensed or authorised financial adviser if you require advice that takes into account your personal circumstances.

2 Change investment allocation

	SECTION 2A My existing balance is (\$ or %)	SECTION 2B I want my existing balance re-allocated to (\$ or %)	SECTION 2C I want my future contributions paid to (%)
	<p>This is the amount(s) (in \$ or %) which you currently have invested in the investment options listed below.</p> <p>Select one</p> <p><input type="checkbox"/> My existing balance allocations shown below.</p> <p>OR</p> <p><input type="checkbox"/> I do not know my existing balance allocation (Leave below blank).</p>	<p>This is how you want your existing balance to be allocated (in \$ or %).</p> <p>Select one</p> <p><input type="checkbox"/> Please re-allocate my existing balance as shown below.</p> <p>OR</p> <p><input type="checkbox"/> Please leave my existing balance allocation unchanged. (Leave below blank)</p>	<p>This is where you want future contributions made to your account to be allocated to (in %).</p> <p>Select one</p> <p><input type="checkbox"/> Please pay my future contributions as shown below.</p> <p>OR</p> <p><input type="checkbox"/> Please pay any future contributions as per the allocation show in Section 2B. (Leave below blank)</p>
Cash option			
Diversified fixed interest option			
Conservative option			
Moderate option			
Balanced MySuper MyLife option			
Growth option			
Australian shares option			
International shares option			
Aggressive option			
Listed property option			
TOTAL – 100% in \$ or %			

3 Signature

Member signature

Date

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Please send the completed form to: Enterprise Plan, PO Box 1282, Albury NSW 2640

Privacy Policy

The information you are providing in this form is subject to the Privacy Amendment (Private Sector) Act 2000. The Act sets out principles for dealing with personal information which includes standards for collection, storage, accuracy and use of information and for disclosure required by the Australian Tax Office as well as your right to access your personal information which we hold. Enterprise Plan has developed policies for complying with this legislation which you may view on request.

Contact us

Address: PO Box 1282, Albury NSW 2640

Phone: 1800 816 575

Email: service@supermanagers.com.au

Website: enterpriseplan.com.au