

# Qantas Super

## Changing your investment options – for Income Accounts

This form is for Income Account members only.

**If you want to change the investment options that apply to another account in Qantas Super, please complete the *Changing your investment options – for super accounts* form available on our website at [www.qantassuper.com.au](http://www.qantassuper.com.au).**

Complete this form to change the investment options that apply to your current account balance or to change the drawdown order of your regular income payments for an income policy\* in your Income Account in Gateway. You can also change your investment options by logging into your Qantas Super account online at [www.qantassuper.com.au](http://www.qantassuper.com.au).

If you are using this form to change:

- the investment options for your current account balance only. Complete Steps 1, 2 and 4;
- the drawdown order of your regular income payments only. Complete Steps 1, 3 and 4; or
- both the investment options for your current account balance AND the drawdown order of your regular income payments. Complete Steps 1, 2, 3 and 4.

Changes to your investment options can be requested by you at any time and will be processed effective the first Wednesday following the date your request is received. The Trustee may also suspend processing of investment switches during times of investment market volatility or illiquidity.

If you're unsure which investment options best suits your needs, we recommend you speak to a licensed financial adviser. Refer to the *Investment Guide* for Qantas Super, available on our website, for details about the investment options available.

\*Multiple income policies – If you have multiple income policies in your Income Account in Gateway, you must complete a separate form for each income policy. For more information on multiple income policies, refer to the Qantas Super Member Guide - Product Disclosure Statement (PDS), available on our website at [www.qantassuper.com.au](http://www.qantassuper.com.au).

### If you need help completing this form

For assistance call the Qantas Super Helpline on **1300 362 967**, Monday to Friday, 8am to 7pm AEST.

## Step 1 – Complete your personal details

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



Title Mr  Mrs  Ms  Miss  Other    Date of birth   /   /

Given names

Surname

Postal address

Suburb                         State    Postcode

Daytime telephone   -           Mobile     -

Email

Member number (for your Income Account)             Income policy number

*Continued over*



## Step 2 – Make your investment choice for your current account balance

You can choose one investment option or any combination of the six available investment options to apply to your current account balance for an income policy in your Income Account in Gateway.

All switches are processed effective the first Wednesday following the date your request is received. The Trustee may suspend processing of investment switches during times of investment market volatility or illiquidity.

**I'd like to change my investment options as follows:**

Investment option	Current account balance		
	% to be invested		
Glidepath	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Aggressive	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Growth	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>TOTAL*</b>	<b>1</b>	<b>0</b>	<b>0</b> %

\* Please ensure the total adds to 100% otherwise this form will not be processed and your investment allocations will remain unchanged until this is corrected.

## Step 3 – Make your investment choice for the drawdown of your regular income payments

You have two options when deciding which investment options should fund your regular income payments for your income policy in an Income Account in Gateway:

### **Option 1: Proportionate drawdown (default)**

Income payments will be drawn proportionately from each of your investment options.

### **Option 2: Priority drawdown (specified below)**

You can choose the order in which we deduct regular income payments from each investment option. We will draw down from your first nominated investment option until it is depleted, and then continue drawing your income from your second nominated investment option, and so on.

For example, if you nominate your drawdown order as 1 for Balanced and 2 for Cash, we will firstly deduct your regular income payments from the Balanced investment option. Once the Balanced investment option is depleted, we will start to deduct regular income payments from the Cash investment option.

You can choose from either option 1 or option 2, but not both.

**If you do not advise us of your drawdown preference, option 1 will apply.**

Investment option	Drawdown order of priority
	number 1 to 6 as required
Glidepath	<input type="text"/>
Aggressive	<input type="text"/>
Growth	<input type="text"/>
Balanced	<input type="text"/>
Conservative	<input type="text"/>
Cash	<input type="text"/>



## Step 4 – Sign the form

By signing this form I understand that:

- my investment option change will be processed effective the first Wednesday following the date my request is received by Qantas Super;
- the Trustee may also suspend processing of investment switches during times of investment market volatility or illiquidity;
- the Trustee's administrator will not action my request if the information is incomplete or ambiguous;
- the information on this form will be handled by the Trustee to process my investment option choice;
- to process my investment option choice, the Trustee may disclose my personal information to the administrator or any other party necessary and I consent to the handling of my personal information in this way; and
- to access my personal information I can write to the Qantas Super Privacy Officer via the address below.

If you're unsure of which investment option suits your needs, we recommend you speak to a licensed financial adviser.

Signature

Date

/   /

**Please return your completed form to Qantas Super, GPO Box 4303, Melbourne, VIC 3001.**

