

# Superannuation and retirement Switch request form

Please complete this form if you wish to switch between investment option(s).

Please indicate which Plan the switch is to be made from:

- Superannuation Plan
  Retirement Income Plan  
 Super Essentials
  Term Allocated Pension

## 1. Personal details

Title	Surname	Given names
<input type="text"/>	<input type="text"/>	<input type="text"/>

Address

Suburb/town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Telephone (home)	Telephone (business)	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>

Male	Female	Date of birth (dd/mm/yy)	Email address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

TFN  
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## 2. Switch details

The minimum switch amount (sale and purchase) is:

- \$500 per investment option for the Superannuation Plan, Retirement Income Plan and Term Allocated Pension.
- \$1,000 per investment option for Super Essentials

Transaction fees may apply.

Please list the investment option(s) to be sold.

Investment options	Number of units

Please list the investment option(s) to be purchased.

Investment options	Number of units* (listed investments)	Amount
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
<b>IMPLEMENTATION FEE (up to 4%)</b>		\$

\* Please note you must sell down or purchase listed investments in whole units.

**3. Privacy**

Please tick this box if you do not wish to receive information on other products and services that may be of benefit to you. Please see the current Product Disclosure Statement for details on privacy and personal information.

**4. Signature and confirmations**

- I have received, read and understood the current offer document or investment report for each investment option I have selected or considered
- I authorise the deduction from my plan of any fees, expenses and taxes payable

Signature Date

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**Financial planner use only**

Name	Phone number
<input type="text"/>	<input type="text"/>

AFSL holder	PortfolioNet account number
<input type="text"/>	<input type="text"/>

- The implementation fee applicable to the investment option to be purchased is recorded in section 2 of this form
- I acknowledge that any liability to pay an adviser service fee and implementation fee (to an AFSL holder approved by the Trustee and stated on this form) will not exceed the amount detailed on this form (except for a GST provision) and that the member or Trustee may cancel or reduce this amount at any time without notice.
- I indemnify the Trustee against any claims arising pursuant to the advice given by me to the member named on this form.
- I have given the member a current offer document and/or investment report for the each investment option selected and the current Product Disclosure Statement (for either Super Essentials, Superannuation Plan, Retirement Income Plan or Term Allocated Pension) which I believe they considered.
- I have reviewed the member's financial situation, needs and objectives and confirm the investment options selected are appropriate and provide, when the investment portfolio is taken as a whole, adequate diversification.

Financial planner signature	Date
<input type="text"/>	<input type="text" value="/ /"/>