



# Switching investment options

You can use this form to change investment options for your current account balance. Making changes to your investment strategy is an important decision. Before making any changes, you should read the smartMonday PENSION [Product Disclosure Statement](#). If you have any questions, please call us on **1300 112 403** or email [one@smartmonday.com.au](mailto:one@smartmonday.com.au).

## Your details

Member number (if known)

Given names

Surname

Phone

Email

Postal address

Suburb

State

Postcode

## Completing this form

To perform a switch of your current account balance complete the *Your investment switch* section on the next page, then complete the *Your declaration* section on the last page.

Return your completed form to:

**mail:** smartMonday PENSION  
PO Box 1282  
Albury NSW 2640

**email:** [one@smartmonday.com.au](mailto:one@smartmonday.com.au)



## Your investment switch

- The investment options you choose must add up to 100% (min. 5% in any option).
- Investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in your account.
- If you want to change the investment options from which your pension payments will be paid, you can do this online via the member portal, or by completing a *Change member details and options* form available at [smartmonday.com.au](http://smartmonday.com.au).
- smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options. We will endeavour to notify members of significant interruptions via [smartMonday.com.au](http://smartMonday.com.au).

| Pre-mixed options        | Current account balance | Sector options                       | Current account balance |
|--------------------------|-------------------------|--------------------------------------|-------------------------|
| High Growth – Index      | %                       | Australian Shares – Index            | %                       |
| High Growth – Active     | %                       | Australian Shares – Diversified      | %                       |
| Growth – Index           | %                       | International Shares – Index         | %                       |
| Growth – Active          | %                       | International Shares – Diversified   | %                       |
| Balanced Growth – Index  | %                       | Property – Diversified               | %                       |
| Balanced Growth – Active | %                       | Fixed Interest – Diversified – Index | %                       |
| Moderate – Index         | %                       | Fixed Interest – Diversified         | %                       |
| Moderate – Active        | %                       | Cash                                 | %                       |
| Defensive – Index        | %                       | <b>Total</b>                         | <b>100%</b>             |
| Defensive – Active       | %                       |                                      |                         |

## Privacy

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

## Your declaration

I declare that:

- I am the person named on this form, or have the power of attorney to act on the member's behalf.
- The information I have provided on this form is true and correct.
- I understand investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in my account.
- I understand that smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options.
- I have read the current smartMonday PENSION [PDS](#) relevant to the product I hold, which is designed to help me understand the product and to enable me to make an informed investment choice that is suitable for me.

Signature

Date