



## Switching investment options

smartMonday PRIME and DIRECT members can use this form to change investment options for your current account balance and/or future cashflow and opt in to automatic rebalancing. Making changes to your investment strategy is an important decision. Before making any changes, you should read the relevant smartMonday Product Disclosure Statement [Investment guide](#). If you require advice about your investments, contact a smartCoach on **1300 262 241** or see your personal financial adviser.

### 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 and/or change how you would like your future contributions to be invested, complete the *Your investment switch* section on the next page, then complete the *Your declaration* section on the last page.

If you're a smartMonday DIRECT member and wish to opt-in to the *Automatic Rebalancing* facility, read the important information and tick the box on the next page.



## 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.
- > 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).

### Automatic rebalancing (*DIRECT members only*)

This facility is not available if:

- > you nominate different strategies for your current account balance and future contributions, or
- > if you hold the Aon MySuper investment option in your portfolio.

If you wish to opt in to automatic rebalancing please tick the opt-in box below. Your automatic rebalancing will then be based on the investment allocations you choose on this form.

If you subsequently change your investment options or asset allocation, this will cancel the automatic rebalancing facility. To reinstate the facility, tick the opt-in box. Your automatic rebalancing will then be based on the investment allocations you choose on this form.

For more information about the facility, see the smartMonday DIRECT PDS [Your investment options](#).

Yes, I am a smartMonday DIRECT member and wish to opt-in to the automatic rebalancing.

Pre-mixed	Current account balance	Future cashflow	Sector	Current account balance	Future cashflow
Aon MySuper*	%	%	Australian Shares – Index	%	%
High Growth – Index	%	%	Australian Shares – Diversified	%	%
High Growth – Active	%	%	Australian Shares – Core	%	%
Growth – Index	%	%	International Shares – Index	%	%
Growth – Active	%	%	International Shares – Diversified	%	%
Balanced Growth – Index	%	%	Property – Australian Index	%	%
Balanced Growth – Active	%	%	Property – Diversified	%	%
Moderate – Index	%	%	Fixed Interest – Diversified – Index	%	%
Moderate – Active	%	%	Fixed Interest – Diversified	%	%
Defensive – Index	%	%	Cash	%	%
Defensive – Active	%	%	<b>Total</b>	<b>100%</b>	<b>100%</b>

\* Aon MySuper is available only to:  
 - smartMonday PRIME members, and  
 - members who transferred from smartMonday PRIME to smartMonday DIRECT on leaving their employer



## 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 PDS *Investment Guide* 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