

# CATHOLIC SUPER Pension Plan



## Application to change investment mix

**Address:** Level 1, 535 Bourke Street Melbourne VIC 3000; PO Box 333, Collins Street West VIC 8007

**Phone:** 1300 550 273 **Fax:** (03) 9648 4720 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use **BLOCK** letters and **black** ink when completing this form.

**To make your investment choice, complete this form and return it to the Fund Office.**

- Use this form to either establish or change the investment mix for your Catholic Super Pension Account Balance.
- There is no direct fee for switching, but there is a buy/sell margin in the unit price for each investment option. The buy/sell margins differ between investment options.
- Consider your options carefully and seek financial advice from a licensed financial planner if you are unsure which options to choose.
- Your investment mix will be updated within one week from when we receive your form (following declaration of that week's unit prices).
- We'll confirm any change to your investment selection in writing.
- If you have any questions, please contact the Catholic Super Helpline on 1300 550 273.

### Membership details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname												
Given Names													
Date of Birth (DD/MM/YYYY)						Catholic Super Membership Number							
Telephone (Home)						Mobile							
Street Number / PO Box				Street Name									
Suburb / Town								State		Postcode			
Email													
<b>Type of Pension</b>													
<input type="checkbox"/> Allocated Pension				<input type="checkbox"/> Pre-retirement Allocated Pension				<input type="checkbox"/> Term Allocated Pension					

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TRUSTEE: CSF PTY LIMITED ABN 50 237 896 957 AFSL 246664 SPIN NUMBER CSF0100AU RSE L0000307 RSE R1000597  
REGISTERED OFFICE: 535 BOURKE STREET MELBOURNE VIC 3000

## Investment choice and payment options

### Investment choice options

You can choose one, or a combination of two or more of the investment options listed below:

INVESTMENT OPTIONS		INVESTMENT INSTRUCTIONS
Managed Choice Options	Aggressive	%
	Moderately Aggressive	%
	Balanced	%
	Moderately Conservative	%
	Conservative	%
Build Your Own Options	Australian Shares	%
	Overseas Shares	%
	Property	%
	Fixed Interest	%
	Cash	%
<b>TOTAL</b>		<b>100%</b>

### Pension Payment Options

**ONE BOX ONLY**

- Matching Payment Option** – Deduct pension payments in the same proportions as the investment options I have selected at left.
- Nominated Payment Option** – Deduct pension payments from my selected investment options but in different proportions as I have shown below.

PENSION PAYMENT INSTRUCTIONS
%
%
%
%
%
%
%
%
%
%
%
<b>100%</b>

## Agreement and declaration

### Privacy

When your personal details are provided to Catholic Super they are securely stored and are accessible only to authorised personnel for the purposes of maintaining your Pension account. If you wish to view Catholic Super's privacy statement please contact us on 1300 550 273.

### Member declaration

I understand the investment options available in Catholic Super and request my Pension Account Balance be invested as shown in this Application.

Signature of applicant

Date (DD/MM/YYYY)

Return the completed, signed and dated application to:

Catholic Super  
PO Box 333  
Collins Street West VIC 8007