

* Defence Bank Pension

Investment switch form (existing balance) – Pension



Instructions

You should not complete this form unless you have received, read and understood the current Defence Bank Pension Product Disclosure Statement (PDS).

You must complete a separate Investment Switch Form for each account you have in the fund

- Please print neatly in BLOCK LETTERS and use a BLACK pen.
- Print X in the appropriate boxes.
- Make sure you read all the instructions before you complete this declaration

Please send us your completed form by ONE of the following methods:

Email: investments@defencebank.com.au **Post:** Defence Bank Pension,
Fax: 03 9654 2187 GPO Box 4344, Melbourne VIC 3001

Please note: if you fax or email the form, there is no need to send us the original.

Step 1 – Member Details

Account Number

Title

First Name

Last Name

Email address (Mandatory requirement)

Date of Birth

Phone number (mobile)

Step 2 – Investment choice (switch existing balance only*)

How would you like your existing money invested?

Defence Bank Pension offers 6 investment options to select how your funds are invested. If an Investment Option is not chosen we cannot accept your application.

Please refer to the PDS on the Defence Bank Limited website at www.defencebank.com.au for more information on investment options or contact us on 03 9654 1399 for a copy.

***Note:** Your existing balance is your balance as at the date this form is processed

I would like to invest in:

Choose your own mix

<input type="text"/>	%	Cash Plus
<input type="text"/>	%	Conservative
<input type="text"/>	%	Balanced
<input type="text"/>	%	Growth
<input type="text"/>	%	High Growth
<input type="text"/>	%	Personal Term Deposit

Total must equal 100%

Step 3 – Authority

- I have received, read and understood the current Product Disclosure Statement and request that my existing balance be invested as shown on this application.
- I understand the information in the Product Disclosure Statement relating to the redemption of investments and allocation of investment earnings where an investment switch is made.
- I acknowledge that the Trustee will invest my superannuation in accordance with my instructions set out in this application but that the Trustee reserves the right not to do so where necessary or appropriate.
- I understand that the Trustee is not responsible for my choice and I accept the investment risks, fees and costs, and rewards of the investment options I choose.
- I understand that any change to my investment strategy will be processed as quickly as possible and that there may be delays in processing any change to my investment strategy if I have not properly completed this form. I understand that my changed investment strategy will apply as at the date my request is processed.

Signature

Date