

# Investment Choice Form



Use this form to make or change your investment choice. You can also update your investment choice(s) online by logging in at [www.russell.com.au/super](http://www.russell.com.au/super)

## 1. Your personal details

We will use these details to calculate your benefits, and to send you updates on your super and other communications. If your details change please advise us by calling the Russell SuperSolution Master Trust (Russell SuperSolution) Helpline or visiting the website at [www.russell.com.au/super](http://www.russell.com.au/super)

Title (Mr Mrs Ms Dr):  Surname:

First Name(s):

Address:

Postcode:

Work telephone:

Home telephone:

Mobile telephone\*:

Email\*:

Member/Investor number:

Name of employer:

\* By providing your email address and/or mobile phone number you are confirming that you would like to, where possible, receive future communications electronically by viewing personal information about your super online through the log in area and receiving news and updates about superannuation via email and/or SMS. Remember, you can call the Helpline to request a hard copy of a particular communication to be sent to you by post or to request to receive future communications in this manner.

## 2. Making an investment choice

You can choose an investment strategy that applies to both your Current Benefit and your Future Transactions. Your Current Benefit is the balance you already have in the Fund. Your Future Transactions include contributions, deductions and rollovers processed in the future.

Alternatively, you can choose an investment strategy for your Current Benefit and a different strategy for your Future Transactions. For example:

- » Current Benefit – 100% Balanced
- » Future Transactions – 50% Balanced; 50% Conservative.

This would mean all the funds you currently have would be invested in the Balanced Portfolio, but contributions you make in the future would be split between the Balanced and Conservative Portfolios.

You can invest in a maximum of 12 portfolios at any point in time.

You can update your choice(s) at any time by visiting the website at [www.russell.com.au/super](http://www.russell.com.au/super)

The effective date of processing will be three business days after your completed form is received by Russell SuperSolution.

My investment choice is:			
Russell Diversified Portfolios		Current % <sup>+</sup>	Future % <sup>++</sup>
<input type="checkbox"/>	1. Russell Conservative	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	2. Russell Diversified 50	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	3. Russell Blended Balanced	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	4. Russell Balanced	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	5. Russell Balanced Opportunities	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	6. Russell Growth	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	7. Russell High Growth	<input type="text"/>	<input type="text"/>
Russell Sector Portfolios		Current % <sup>+</sup>	Future % <sup>++</sup>
<input type="checkbox"/>	8. Russell Australian Cash	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	9. Russell Australian Shares	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	10. Russell Australian Opportunities	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	11. Russell Socially Responsible Australian Shares	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	12. Russell International Property Securities – \$A Hedged	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	13. Russell International Shares	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	14. Russell International Shares – \$A Hedged	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	15. Russell Global Opportunities	<input type="text"/>	<input type="text"/>
<b>Total:</b>		<b>100%</b>	<b>100%</b>

+ New strategy for Current Benefit  
++ New strategy for Future Transactions

In preparing this form the Trustee has not taken into account the investment objectives, financial situation and particular needs (financial circumstances) of any person. Accordingly, before making a decision to change your investment choice you should read the current Product Disclosure Statement and seek advice tailored to your own financial circumstances.

**Do you want to rebalance your investments?**

This option is only relevant to you if you have selected more than one investment portfolio. If you select to rebalance your investments we reset your account balance on the 15th of each month, to match the original investment strategy you selected.

For example:

	Balanced	Conservative	Total
<b>Initial investment</b>	\$5,000	\$5,000	\$10,000
<b>Your balance on the 15th of the following month</b>	\$5,300	\$5,100	\$10,400
<b>Your balance after rebalancing</b>	\$5,200	\$5,200	\$10,400

If you select this option you cannot switch your investments for the three working days prior to the 15th of each month. You cannot select this option if you have selected different strategies for your Current Benefit and Future Transactions.

Tick this box if you would like to rebalance your investments automatically each month.

**3. Your declaration**

I instruct Russell SuperSolution to change my investment choices as indicated on this form.

I have read and considered the current Product Disclosure Statement for my division of Russell SuperSolution.

Signature: \_\_\_\_\_

Date: