

Choice of Investment Strategy

Please print clearly in black ink.

Notes to members

For **contributing SASS members**, investment choice applies to the personal account balance. Investment choice does not apply to the lump sum basic benefit, the balance of any Additional Employer Contribution (AEC) or Commonwealth Government co-contribution account or any superannuation guarantee shortfall amount.

Contributing SASS members should use this form to change the investment strategy in which the current account balance is invested and/or choose the investment strategy in which the future contributions will be invested.

For **deferred SASS members**, investment choice applies to the whole of a deferred SASS member's benefit excluding the lump sum basic benefit (which includes any deferred AEC amount), and any Commonwealth Government co-contribution account or superannuation guarantee shortfall amount.

If you are a **deferred SASS member**, you should only complete Sections 1, 2 and 4 as you are not able to contribute to SASS.

Information regarding SASS Member Investment Choice, including explanations of investment strategies, is detailed in SASS Fact Sheet 15: *Choosing an investment strategy*. You should read the Fact Sheet before completing this form. To obtain the fact sheet, either contact Customer Service on 1300 130 095 or print a copy from our website, www.statesuper.nsw.gov.au.

We recommend you seek professional financial advice before choosing your investment strategy.

Mark one box with a cross.

1. Your personal details

Type of SASS membership

- ☐ SASS contributor
☐ Deferred SASS member

Member number

Mr/Mrs/Ms/Miss/Dr

Male

☐

Female

☐

Birth date (DD-MM-YYYY)

 - -

Given name(s)

Family name

If you need help with this form

Contact Customer Service between 8:30am and 5:30pm AEST from Mon–Fri on **1300 130 095** or email enquiries@stc.nsw.gov.au

1. Your personal details (continued)

[illegible][illegible]

Age Group	Percentage
18-24	10%
25-34	15%
35-44	20%
45-54	25%
55-64	30%
65-74	35%
75-84	40%
85+	45%

Rules that apply to switching between strategies

- ▶ You may switch between investment strategies no more frequently than once a month.
- ▶ If your election to switch form is received by Mercer on or before the 25th day of a month, the switch will be made at the close of business on the last day of that month, meaning that the new strategy will apply from the first day of the following month. If your form is received by Mercer after the 25th day of a month, it will not be processed until the last day of the following month.
- ▶ Once you have sent the form requesting an investment switch, that election cannot be revoked and will be processed. You can, however, choose to switch again in any subsequent month.
- ▶ The first switch in each financial year is free of charge. For every additional switch made within a financial year, a fee of \$25 will be charged.

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2. Please invest my current account balance as follows:

By completing this section you are nominating how your current account balance is to be invested. Complete this section only if you want to change the investment strategy in which your current account balance is invested.

Please use WHOLE percentages only.

Please check your confirmation letter to ensure that your current account balance has been invested in accordance with your instructions. Please note that any amendment will only be actioned at the time of receipt of any replacement form and processed in accordance with normal fund rules.

***Important: If you do not complete this form properly (i.e your % strategies must add up to 100%) and sign it where required, your investment choice will not be valid and no change will be made to how your current account balance is invested.**

Investment strategy	Percentage			
Growth				%
Balanced				%
Conservative				%
Cash				%
TOTAL	1	0	0	%

3. Please invest my future contributions as follows:

Do not complete this section if you are a **deferred SASS member** as you are not able to contribute to SASS.

By completing this section you are nominating how your future contributions are to be invested. If the nomination is the same as your existing nomination outlining how your future contributions are to be invested, no change will be required to be made to your account and therefore no change will be made.

Please use WHOLE percentages only.

Please check your confirmation letter to ensure that your future contributions will be invested in accordance with your instructions. Please note that any amendment will only be actioned at the time of receipt of any replacement form and processed in accordance with normal fund rules.

***Important: If you do not complete this form properly (i.e your % strategies must add up to 100%) and sign it where required, your investment choice will not be valid and no change will be made to how your future contributions are invested.**

Investment strategy	Percentage			
Growth				%
Balanced				%
Conservative				%
Cash				%
TOTAL	1	0	0	%

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ABN 29 239 066 746
SPIN SAS0101AU

Or Scan your completed and signed form and email it directly to:
enquiries@stc.nsw.gov.au

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