

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)

Residential address

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Suburb

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State/Territory

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Postcode

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Postal address

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Suburb

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State/Territory

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Postcode

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Work or Home Daytime contact telephone number

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Mobile number

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Name of employer

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Email address

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.

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**

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	%

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**

Your privacy

The information you provide in this form is collected on behalf of and held for State Super by the scheme administrator, Mercer Administration Services (Australia) Pty Ltd, in accordance with STC's Privacy Statement, the *Privacy and Personal Information Protection Act 1998 (NSW)* and the *Health Records and Information Privacy Act 2002 (NSW)*, under which you have rights of access and correction. Information you provide may be disclosed to lawfully authorised government agencies and third parties.

For further information about privacy, contact Mercer by writing to:

GPO Box 2181
Melbourne VIC 3001

or visit

www.statesuper.nsw.gov.au

ABN 29 239 066 746
SPIN SAS0101AU

4. Declaration (to be completed by all applicants)

- I understand that SASS Fact Sheet 15: *Choosing an investment strategy* contains a detailed description of the SASS investment strategies and how my request will be processed.
- I understand that State Super can provide me with information but does not provide investment advice, and that independent financial advice may assist me if I have any questions about the information provided by State Super.
- I understand that my nomination to change the investment strategy in which my current account balance is invested and/or my nomination to change the investment strategy in which my future contributions will be invested will override and change any choice made by me previously.
- In regard to SASS contributors only: I understand that this election only applies whilst I am a SASS contributory member and that on deferring any benefit the benefits deferred will be invested in the default option unless I make an election specific to my deferred benefit at the time of deferral.
- I understand that if my choice of investment strategy 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.
- I understand that if my choice of investment strategy 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.
- I understand that my first change to the investment strategy in which my current account balance is invested in any financial year is free of charge and that any subsequent changes are levied a fee of \$25 per change.
- I understand that I will receive a confirmation letter which confirms the changes made to my account. If these changes are not consistent with my instructions I acknowledge that I must contact Mercer to advise them of the error.

Name (Print in BLOCK LETTERS)

Signature

Date

Return the completed form to

State Super (SASS)
GPO Box 2181
MELBOURNE VIC 3001

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

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