Mercer

Changing your investment options in the Mercer Super Trust

Take control of how your super is invested.

You can change how your super is invested in the Mercer Super Trust at any time. Simply choose one or more of the investment options available to you as shown in your Product Disclosure Statement or Super Kit. If you nominate invalid investment options or if you provide any information that is incomplete or ambiguous in the opinion of the trustee, your request will not be actioned.

Your investment choice decisions can have a significant effect on the investment performance of your super. If you're unsure of your decisions we recommend that you see a licensed or appropriately authorised financial adviser.

Please refer to your Product Disclosure Statement for details about the investment choices and options available under your plan.

If you need help

For assistance or to access the Privacy Policy and your personal information call the Helpline on **1800 682 525**.

This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box.

Want to make this quicker and easier?

Did you know you can also do this in your Member Online account? It's faster, easier and more secure for you **www.mercersuper.com.au**

Having trouble? Here's some troubleshooting information to help get you logged in **www.mercersuper.com.au/member-online-and-mercer-super-app**

Step 1: Complete your personal details

Title: Mr ◯ Mrs ◯ Ms ◯ Miss ◯ Other ☐☐☐☐☐☐ Date of birth: ☐☐/☐☐/☐☐☐☐

Given names

Surname

Postal address

Suburb State

Postcode Telephone - Mobile

E-mail

Account/Membership number

Plan/Product name

Name of your employer

Issued by Mercer Superannuation (Australia) Limited (MSAL) ABN 79 004 717 533, AFSL 235906, as trustee of the Mercer Super Trust, ABN 19 905 422 981.
Address: GPO Box 4303, Melbourne Vic 3001. Tel: 1800 682 525. 'Mercer' is a registered trademark of Mercer (Australia) Pty Ltd ABN 32 005 315 917.

Step 2: Choose your investment options

I elect to change my investment options as detailed below. My change is to apply to: *Select an option* ✓

- ◯ I elect to **change my investment strategy for my current account balance** as detailed below and to keep my current strategy for my future contributions and transfers.
- ◯ I elect to **change my investment strategy for my future contributions and transfers** as detailed below and to keep my current account balance invested as it currently is.
- ◯ I elect to **change my investment strategy for my current account balance and my future contributions and transfers** as detailed below.

Ready-made investment options

	Percentage to be invested
Mercer SmartPath	%
Mercer Diversified Shares	%
Mercer High Growth	%
Mercer Select Growth	%
Mercer Growth	%
Mercer Moderate Growth	%
Mercer Conservative Growth	%

Select-your-Own investment options (list any chosen Select-your-Own option in the space below)

1.		%
2.		%
3.		%
4.		%
5.		%
6.		%
7.		%
8.		%

Total % (must equal 100%) 1 0 0 %

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Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your superannuation. You can read our Privacy Policy online at **mercer.com.au/privacy** or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 3: Sign the form

By signing this form I understand that:

- any investment option changes will be effective from the date the change is made by the trustee's administrator
- the trustee's administrator will not action my request if in the trustee's opinion any information is incomplete or ambiguous
- a buy/sell spread (the difference between entry and exit unit prices) applies on switching into or out of some investment options, and that I can obtain a unit price quote (reflecting any buy/sell spreads), by logging in to **www.mercersuper.com.au** or calling the Helpline
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature ✗ Date ☐☐ / ☐☐ / ☐☐☐☐

3 easy ways to return your form

To make submitting your completed form as simple as possible, we've provided three easy options for you to choose from. Please read through the choices below and select the one that's most convenient for you.

Use Member Online

The fastest and more secure way to send back your forms is through the contact us page within Member Online. Simply save and attach the PDF of your completed form and you're done.

www.mercersuper.com.au

Email Us*

Another way to send back your form is via email. It's quicker if you use your email address you use to log in and send to

MST@Mercer.com

Please see below note for submitting forms via email.

Post it back

Otherwise, you can always send it back to us using the below postal address

Mercer Super Trust,
GPO Box 4303,
Melbourne, VIC 3001

***Email note:**

This is a 'no-reply' mailbox and should only be used to submit a form.

- Only one form per email can be accepted to ensure each form and its supporting documentation is processed correctly.
- A total of 6 attachments per form/email with a maximum size limit of 14MB.
- The file formats accepted are PDF, JPEG, PNG and JPG.

If you have an inquiry, please submit this via the contact us page or call the helpline on **1800 682 525**.

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