

Change a Member's Investments (Financial Adviser)



Super SA



Triple S / Flexible Rollover Product / Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

3. Select client's scheme

Please change the following schemes investment option/s:

⚠ Use separate forms for each scheme you are making changes.

Triple S
(complete section 4 and 5)

Flexible Rollover Product (FRP)
(complete section 4 and 5)

Income Stream
(complete section 4 and 6)

⚠ Please note: 'Stable' investment was previously named 'Conservative'.

4. Change current investments (All schemes)

Please change the current balance to be invested as follows:

⚠ Use whole percentages.

High Growth	<input type="text"/>	%	Moderate	<input type="text"/>	%	Cash	<input type="text"/>	%
Socially Responsible	<input type="text"/>	%	Stable	<input type="text"/>	%	TOTAL	= 100	%
Balanced	<input type="text"/>	%	Capital Defensive	<input type="text"/>	%			

5. Change future contributions investments (Triple S & FRP only)

Please change future contributions into selected scheme to be invested as follows:

⚠ Use whole percentages.

High Growth	<input type="text"/>	%	Moderate	<input type="text"/>	%	Cash	<input type="text"/>	%
Socially Responsible	<input type="text"/>	%	Stable	<input type="text"/>	%	TOTAL	= 100	%
Balanced	<input type="text"/>	%	Capital Defensive	<input type="text"/>	%			

6. Change the withdrawal order (Income Stream only)

Please change the draw down order for all future withdrawals as follows:

(number ALL the boxes 1 through 7, with 1 being the investment to be withdrawn first.)

Cash	<input type="text"/>	Moderate	<input type="text"/>	Socially Responsible	<input type="text"/>
Capital Defensive	<input type="text"/>	Balanced	<input type="text"/>	High Growth	<input type="text"/>
Stable	<input type="text"/>				

Change a Member's Investments (Financial Adviser)



Super SA



Triple S / Flexible Rollover Product / Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

7. Financial Adviser Authority

To allow the financial adviser listed in section 2 to receive information regarding this investment switch within my account, I request and consent to give my financial adviser access to my account information and understand that:

- once access is granted, my financial adviser and/or their staff will only be able to obtain information on my account relating to this switch.
- this authority is limited to the investment switch within this form
- my financial adviser is not able to make changes to my account.
- should I wish to allow my financial adviser access to receive information beyond this investment switch, I will complete a "Authority to release information to a third party" form

8. Member declaration

- I declare the information supplied on this form is true and correct.
- I acknowledge that I've read and understood the information in the relevant Investment Guide (available at supersa.sa.gov.au) and I understand that:
 - Investing in an investment option involves some risk and on occasion my account balance may decrease and accept responsibility for my selection.
 - Super SA doesn't guarantee my investment or any rate of return.
 - The unit price for the investment option(s) I have elected on this form may be more or less than was quoted at the time of making this election.
 - The unit price applied to a switch will represent the market value of an investment option calculated after the switch is received.
 - Past performance is not a reliable indicator of future performance.
 - A request to switch your account balance that is received before 5pm on a business day will generally take effect on the third business day following the date of receipt.
 - No additional investment switches can be processed online until the previous investment switch has been completed, for more information please contact Super SA.

Signature

Date / /

9. Financial Adviser Declaration

By signing the below, I confirm and declare that:

- The change to investment exposures, risks and fees has been explained to the above listed member.
- I have provided the member with the relevant investment guide.

Financial Adviser Name

Signature

Date / /

! Please note: Section 8 and 9 must be signed for this investment change to be processed by Super SA.

Super SA is changing how our unit pricing is attributed. While we upgrade our system to the new process, transactions will be limited. Requests received between 13 and 20 January 2025 will be delayed until after this period. Rest assured, your super is secure and we can still receive all contributions. Processing will simply be delayed.

For further information, see the relevant Significant Event Notice available on our website at: supersa.sa.gov.au/about-us/significant-event-notices

Contact us

Email supersa@sa.gov.au

Website supersa.sa.gov.au

Member Centre, Karna Country
Ground floor, 151 Pirie St Adelaide SA 5000
(Enter from Pulteney Street).

Post GPO Box 48, Adelaide SA 5001

Phone (08) 8214 7800