

# NESS Pension Change My Investment Choice Form



Please complete and return this form to: NESS Super, Locked Bag 5042, Parramatta NSW 2124  
Complete in pen using CAPITAL letters or type directly into this form and print it out.  
Use (X) to mark boxes. This request must be signed and dated.

- Website:** www.nesssuper.com.au
- Email:** nessadmin@aas.com.au
- Freecall:** 1800 022 067

Please complete this form if you would like to change your investment option/s. You can also change your investment options via Pension MemberAccess. To register go to [www.nesssuper.com.au](http://www.nesssuper.com.au) and click on the Pension MemberAccess link and follow the prompts. Please note that confirmation of your investment switch will be sent to you within 7 days of processing your switch. Please check this carefully and contact us immediately if it does not reflect the instructions you provided on this form.

## 1. Pension member details (Please complete in full)

Pension Member Number (This can be found on your Pension Member Statement)

Mr/Mrs/Ms/Miss

Surname

Given names

Date of birth (ddmmyyyy)

Male/Female

Telephone (daytime)

Mobile

Email

### Residential address

Street number

Street name

Suburb/Town

State

Postcode

### Postal address (if different to residential address)

PO Box

Suburb/Town

State

Postcode

Please turnover to complete and sign this form

## 2a) Change of investment choices – NESS Account Based Pension

Please refer to page 24 of the current NESS Pension PDS at [www.nesssuper.com.au](http://www.nesssuper.com.au) for more information about NESS Account Based Pension investment options, before making a selection.

Your investment options can be mixed in any combination to achieve your personal investment objectives.

Choose (X) one option.

**Investment Option 1**

You can choose the same investment options to apply to both your pension account balance and pension payments and transactions,

or

**Investment Option 2**

You can choose different investment options to apply to your pension account balance and future pension payments and transactions. Please note that if there are insufficient funds in the investment option you have chosen for your future pension payments and transactions, the payment will be made from your Pension account balance options in proportion to the balance held in each investment option.

NESS Account Based Pension investment options	Investment Option 1	Investment Option 2	
	Pension account and future pension payments	Pension account balance only	Future pension payments and transactions only
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cautious	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Assertive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Aggressive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total must add to 100%</b>	<b>1 0 0</b> %	<b>1 0 0</b> %	<b>1 0 0</b> %

## 2b) Change of investment choices – NESS Transition to Retirement Pension

Please refer to page 22 of the current NESS Pension PDS at [www.nesssuper.com.au](http://www.nesssuper.com.au) for more information about NESS Transition to Retirement Pension investment options, before making a selection.

Your investment options can be mixed in any combination to achieve your personal investment objectives.

Choose (X) one option.

**Investment Option 1**

You can choose the same investment options to apply to both your pension account balance and pension payments and transactions,

or

**Investment Option 2**

You can choose different investment options to apply to your pension account balance and future pension payments and transactions. Please note that if there are insufficient funds in the investment option you have chosen for your future pension payments and transactions, the payment will be made from your Pension account balance options in proportion to the balance held in each investment option.

NESS Transition to Retirement Pension investment options	Investment Option 1	Investment Option 2	
	Pension account and future pension payments	Pension account balance only	Future pension payments and transactions only
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Stable	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
NESS MySuper	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Overseas Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total must add to 100%</b>	<b>1 0 0</b> %	<b>1 0 0</b> %	<b>1 0 0</b> %

### 3. Declaration

Please make the changes to my current pension account balance and future pension payments authorised by me on this form.

I declare that:

- I have received, read and understood all of the information that is reasonably required, in order to make an informed decision about my investment options and how to complete this form. NESS Super's Privacy Policy, Financial Services Guide and the current NESS Pension PDS, are all readily available from [www.nesssuper.com.au](http://www.nesssuper.com.au) and I can contact NESS Super at any time, if I require assistance.
- I understand any information provided by NESS Super is of a general or factual nature only. The information does not take into account my personal investment objectives, financial situation or particular needs. I acknowledge that NESS Super has recommended that I seek professional financial advice before making any investment decision.
- I understand that the Trustee will act upon my instructions contained in this form as soon as practicable and that these instructions will supersede all previous investment elections.
- I understand my investment switch will occur in accordance with the guidelines outlined in the current NESS Pension PDS.
- I understand that once I make an investment choice, it cannot be reversed. A further switch can be lodged which will take effect on the relevant date for that particular switch.

**Signature**



**Date**

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

**Print full name**