

Change of Member Details



Colonial Select Personal Superannuation

Colonial Select Allocated Pension

Issued by The Colonial Mutual Life Assurance Society Limited ABN 12 004 021 809

AFSL 235035 (CMLA) on behalf of Colonial Mutual Superannuation Pty Ltd ABN 56 006 831 983

AFSL 235025 (The Trustee), Trustee of Colonial Super Retirement Fund ABN 40 328 908 469 (the Fund).



Please write in **BLOCK** letters and use a ballpoint pen to complete this form.

Section 1 – New Personal Details

Membership number Title Mr Mrs Miss Ms Other Date of birth / /

Surname Given name(s)

Mailing address

State Postcode Country

Home telephone () Business telephone () Mobile

Email address Occupation (if applicable) Salary (if applicable) \$

Section 2 – Nomination of dependant(s)

This nomination is subject to the Trustee's discretion and is not binding on the Trustee.

You can nominate one or more dependants or your legal personal representative (i.e. your estate) for consideration by the Trustee to receive your benefits in the event of your death.

A nomination of a dependant is only valid if the person is a dependant at the time of your death. Your dependant is:

- a spouse, which includes someone (whether of the same or different sex) with whom you are in a relationship registered under State or Territory law, and also another person with whom you live as a de facto couple;
- a child, which includes adopted, step or ex-nuptial children, a child of your spouse, and also someone who is your child within the meaning of the Family Law Act 1975;
- any person with whom you have an interdependency relationship;
- any other person financially dependent on you.

Full name	Relationship to you	Date of birth	Share of benefit
		/ /	%
		/ /	%
		/ /	%
		/ /	%
My estate (i.e. legal personal representative)			%
Total Amount			100%

Section 3 – New investment strategy

A maximum of 20 investment options may be selected in total (10 for your Account Balance Strategy and 10 for your Future Investment Strategy). Please specify (by completing the tables below) how you would like your existing account balance and any future investments applied at the effective date of your switch. Your Account Balance Strategy may be different to your Future Investment Strategy. All future investments will be pro-rated and applied to your Future Investment Strategy and fees/taxes pro-rated and deducted from your Account Balance Strategy and your Future Investment Strategy. Please refer to your Product Disclosure Statement (PDS) for details on available investment options.

If no Future Investment Strategy is provided all future transactions will be based on the Account Balance Strategy.

Please complete the table below.

- **Change Account Balance Strategy:** Alters investment strategy for all assets currently held in your Account.
- **Change Future Investment Strategy:** Alters investment strategy for all future assets received and transactions in your Account.

	Colonial Select Allocated Pension Investment option code	Colonial Select Personal Superannuation Investment option code	Change Account Balance Strategy	Change Future Investment Strategy
Aggressive strategy				
International shares				
Multi-Manager Global Share Fund	EXCMOE	SXCMOE	%	%
MFS Global Equity Option	EXAMOE	SXAMOE	%	%
BT Core Global Share Option	EXROOE	SXROOE	%	%
FirstChoice Wholesale Geared Global Share Fund	EXFSGG	SXFSGG	%	%
Colonial First State Wholesale Global Resources Fund	EXFSRE	SXFSRE	%	%
FC W'sale Stewart Investors Worldwide Leaders Fund	EXFSOE	SXFSOE	%	%
Colonial First State Wholesale Index Global Share Fund	EXCTOE	SXCTOE	%	%
Capital International Global Share Option	EXCSOE	SXCSOE	%	%
Perpetual International Option	EXFIOE	SXFIOE	%	%
Schroder Asia Pacific Fund	EXSAOE	SXSAOE	%	%
Australian shares				
Multi-Manager Australian Share Fund	EXCMDE	SXCMDE	%	%
Ausbil Australian Active Equity Option	EXCSDE	SXCSDE	%	%
BT Core Australian Share Option	EXRODE	SXRODE	%	%
Colonial First State Wholesale Australian Share Fund – Core	EXCPAS	SXCPAS	%	%
Colonial First State Wholesale Geared Share Fund	EXFSGS	SXFSGS	%	%
Colonial First State Wholesale Imputation Fund	EXFSDE	SXFSIM	%	%
Colonial First State Wholesale Index Australian Share Fund	EXCTDE	SXCTDE	%	%
Colonial First State Wholesale Small Companies Fund – Core	EXCPSC	SXCPSC	%	%
Maple-Brown Abbott Imputation Option	EXMBIM	SXMBIM	%	%
Perpetual Industrial Share Option	EXPPIS	SXPPIS	%	%
Schroder Australian Equity Option	EXSADE	SXSADE	%	%
Property				
Multi-Manager Property Securities Fund	EXCMPS	SXCMPS	%	%
BT Property Investment Option	EXROPR	SXROPR	%	%
Colonial First State Wholesale Property Securities Fund	EXFSPR	SXFSPR	%	%
Ironbark Wholesale Property Securities	EXDPPS	SXDPPS	%	%
Diversified				
Multi-Manager High Growth Fund	EXCMHG	SXCMHG	%	%
Colonial First State Wholesale High Growth Fund	EXFSHG	SXFSHG	%	%
FirstChoice Wholesale High Growth	EXFIGR	SXFIGR	%	%
Growth strategy				
Diversified				
Multi-Manager Growth Fund	EXCMGR	SXCMGR	%	%
BT Active Balanced Option	EXRODI	SXRODI	%	%
Colonial First State Wholesale Diversified Fund	EXFSDI	SXFSDI	%	%
Multi-Index Balanced Fund	EXCSGR	SXCSGR	%	%
Perpetual Balanced Growth Option	EXPPBA	SXPPBA	%	%
Moderate strategy				
Diversified				
Multi-Manager Moderate Fund	EXCMMO	SXCMMO	%	%
Colonial First State Wholesale Balanced Fund	EXFSBA	SXFSBA	%	%
Perpetual Diversified Growth Option	EXPPGR	SXPPGR	%	%

Section 3 – New investment strategy (continued)

	Colonial Select Allocated Pension Investment option code	Colonial Select Personal Superannuation Investment option code	Change Account Balance Strategy	Change Future Investment Strategy/Pension Drawdown
Conservative strategy				
Diversified				
Multi-Manager Conservative Fund	EXCMCO	SXCMCO	%	%
Colonial First State Wholesale Conservative Fund	EXFSCS	SXFSCS	%	%
Multi-Index Conservative Fund	EXGSCS	SXCSCS	%	%
Perpetual Conservative Growth Option	EXPPCO	SXPPCO	%	%
Defensive Strategy				
Fixed interest				
Colonial First State Wholesale Australian Bond Fund	EXFSDF	SXFSDF	%	%
Multi-Manager Fixed Interest Fund	EXCMFI	SXCMFI	%	%
Aberdeen Australian Fixed Income Option	EXACFI	SXACFI	%	%
Diversified				
Multi-Manager Defensive Fund	EXMLR	SXMLR	%	%
Cash				
Colonial First State Wholesale Institutional Cash Fund	EXCPCA	SXCPCA	%	%
TOTAL			100%	100%

Section 4 – Insurance details



Section 4 is to be completed by members of Colonial Select Personal Superannuation only

Smoker Status

Have you smoked in the last 12 months? **Please note that the premium will be based on smoker rates unless you specify otherwise.**

Yes No

Insurance Cover

I would like the following decrease/increase in cover. Please advise new cover or sum assured amount.

Death cover \$

TPD cover \$

Income Protection cover \$

Please note TPD cover cannot exceed Death cover.



Note: A Personal Statement Summary must be completed if you are increasing insurance cover. This form will be sent to you if required.

Changes to insurance will not apply until CLMA gives written acceptance of the new level of cover on standard terms or you accept the non-standard terms offered by CMLA.

Section 5 – New pension payment details



Sections 5 & 6 are to be completed by members of Colonial Select Allocated Pension only

Frequency

Monthly Quarterly Half-yearly Yearly

Date that the new pension payments will commence

Month Year

Annual rate of pension (please tick (✓) one box)

Minimum payment or Selected annual amount of \$

Indexation option

No increase % p.a. % (insert %) CPI linked



- If you have elected to receive the minimum allowable pension amount, you cannot nominate to have your pension payments indexed.
- If you nominate a pension amount, this will apply from the next pension payment. The annual pension amount therefore must meet the minimums prescribed by the government for the current financial year.
- If you nominate an annual amount and pension payment(s) have been made, your remaining pension payment(s) will be recalculated to achieve this amount.

Section 6 – New bank account details (for direct bank remittance of pension)

Name of account

Bank

Branch

BSB (Branch number)

Account number

Section 7 – Investor's declaration

- I believe that I have obtained sufficient information to explain the investment objectives, the risk and effect of each investment option; and
- I declare that if this Change of Member Details form is signed under a Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with the Change of Member Details form).

Member signature

Date

If you have any queries or need assistance to complete this form, please contact your financial adviser or call one of our Customer Service Representatives on 1800 552 660 between 8.30am and 6.00pm (Sydney time), Monday to Friday.



Mail this completed form to:

Colonial Select Personal Superannuation OR

Colonial Select Allocated Pension

Locked Bag 5075

PARRAMATTA

NSW 2124