

MyLife MyPension

Application to Change Investment Mix

This form is to be used by members with an Retirement Pension, Pre-Retirement Pension or a Term Pension account.

You can change how your money is invested in MyLife MyPension at any time. Simply choose the investment options available to you as shown in the Product Disclosure Statement (PDS) or other documentation provided in relation to investment choice. 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. You will be advised if this is the case.

If you're unsure of your decisions we recommend that you see a licensed or appropriately authorised financial adviser. Please refer to the Product Disclosure Statement, or other documentation provided, for details about the investment choices and options available under the Fund.

If you need help

For assistance call our Service Centre on **1300 963 720**.

Step 1 – Complete your personal details

Please print in black or blue pen,
in uppercase, one character per box.



Title	Mr <input type="radio"/>	Mrs <input type="radio"/>	Ms <input type="radio"/>	Miss <input type="radio"/>	Other <input type="text"/>	Date of birth	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names																
<input type="text"/>																
Surname																
<input type="text"/>																
Residential address																
<input type="text"/>																
Suburb												State			Postcode	
<input type="text"/>												<input type="text"/>			<input type="text"/>	
Postal address (if different to above)																
<input type="text"/>																
Suburb												State			Postcode	
<input type="text"/>												<input type="text"/>			<input type="text"/>	
Daytime Telephone								Mobile								
<input type="text"/>								<input type="text"/>								
E-mail																
<input type="text"/>																
Membership number																
<input type="text"/>																

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Issued by Togethr Trustees Pty Ltd ABN 64 006 964 049; AFSL 246383 as Trustee of the MyLifeMyMoney Superannuation Fund ABN 50 237 896 957.



Step 2 – Choosing the Pension Default Strategy for your Retirement Pension

Complete this step if you would like to choose the Pension Default Strategy for your Retirement Pension (please note this strategy is not available for Pre-Retirement pensions).

- ☐ I choose to invest my account balance and future pension payments in the Pension Default Strategy. I understand that:
- The Pension Default Strategy applies to my account balance and pension payments
 - My account balance may be rebalanced at every quarter to align my investments with the Pension Default Strategy.

If you have completed this Step, then please go to Step 5 on page 4 and sign the form. You do not need to complete any information in 'Step 3 - Choose your investment options for your pension account balance' or 'Step 4 - Choose your investment options for your pension payments'. Your pension payment drawdown strategy will be established in line with the Pension Default Strategy. Please refer to the PDS for further information.

Step 3 – Choose your investment options for your pension account balance

You can leave this section blank if you only want to change the investments from which your pension payments are drawn (see Step 4).

Complete this step if you would like to choose your own investment options. You can choose one or more investment options in any percentage. Please ensure the total adds up to 100% otherwise this form will not be processed and your investment allocation will remain unchanged. Alternatively, you can make online changes through your secure Member Online account at

www.mylifemypension.com.au.

Do not complete this section if you have selected to invest in the Pension Default Strategy by completing Step 2 above. Please note that if you are in the Pension Default Strategy, and you make a selection under Step 3, you will cease to be in the Pension Default Strategy. This means that future rebalancing of your account balance will no longer occur. Refer to your PDS for further details.

	% to be invested
Managed Choice Options	
Aggressive	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderately Aggressive	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderately Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %
PositiveIMPACT	<input type="text"/> <input type="text"/> <input type="text"/> %
RetirePlus	<input type="text"/> <input type="text"/> <input type="text"/> %
RetireStable	<input type="text"/> <input type="text"/> <input type="text"/> %
Build Your Own options	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Overseas Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %
FlexiTerm Deposit*	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %
TOTAL	1 0 0 %

* FlexiTerm Deposit is a closed investment option, however you can elect to fully switch out of FlexiTerm Deposit if you are already invested in this option.



Step 4 – Choose your investment options for your pension payments

If you do not complete this section of the form, each pension payment will be drawn proportionally from your assets.

Option 1: New Percentage (%)

You can choose to have your pension payments made from one or more of the investment options you have chosen in Step 2 for your account balance. For example if your account is invested 80% Balanced and 20% Cash, you could choose to have your payment made from Balanced option only. Please ensure that all the percentages add to 100%.

Once there's no longer enough money in your chosen option(s), payments will automatically be deducted from the account balance invested in your other option(s). You'll be notified at the time, and can adjust your investment choice if desired.

% to be invested

Managed Choice Options			
Aggressive	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Moderately Aggressive	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Moderately Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/> %
PositiveIMPACT	<input type="text"/>	<input type="text"/>	<input type="text"/> %
RetirePlus	<input type="text"/>	<input type="text"/>	<input type="text"/> %
RetireStable	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Build Your Own options			
Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Overseas Shares	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Property	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Diversified Fixed Interest	<input type="text"/>	<input type="text"/>	<input type="text"/> %
FlexiTerm Deposit*	<input type="text"/>	<input type="text"/>	<input type="text"/> %
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/> %
TOTAL	1	0	0 %

Option 2: Priority Drawdown

You can choose the Managed Choice and Build Your Own options from which pension payments are drawn by electing a drawdown order. Pension payments will only be drawn from one investment option at a time. MyLife MyPension will draw from your first nominated investment option until this is depleted continuing down your nominated drawdown order. For example, if your account balance is invested in 50% Balanced, 25% Aggressive and 25% RetirePlus you could choose to have your payments drawdown in the order 1. Balanced, 2. RetirePlus and 3. Aggressive.

Drawdown order (number 1 to 14 as required)

Managed Choice Options			
Aggressive	<input type="text"/>	<input type="text"/>	<input type="text"/>
Moderately Aggressive	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>
Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>
Moderately Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>
PositiveIMPACT	<input type="text"/>	<input type="text"/>	<input type="text"/>
RetirePlus	<input type="text"/>	<input type="text"/>	<input type="text"/>
RetireStable	<input type="text"/>	<input type="text"/>	<input type="text"/>
Build Your Own options			
Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overseas Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>
Property	<input type="text"/>	<input type="text"/>	<input type="text"/>
Diversified Fixed Interest	<input type="text"/>	<input type="text"/>	<input type="text"/>
FlexiTerm Deposit*	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>

* FlexiTerm Deposit is a closed investment option, however you can elect to receive your pension payments from FlexiTerm Deposit if you are already invested in this option.




Step 5 – 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 MyLife MyPension
- have read the Fund's privacy guide available at mylifemypension.com.au/privacy. I understand and consent to my personal information being collected and used by the Fund in accordance with this privacy guide.
- the Trustee's administrator will not action my request if the information is incomplete or ambiguous
- I will be able to change my investment option as required
- the information on this form will be handled by the Trustee to process my investment option choice
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature



Date

/ /

Please return your completed form to MyLife MyPension, GPO Box 4303, Melbourne, VIC 3001.

