

# Investment Choice form

Rest Pension and Rest Term Allocated Pension



**Use this form to select or change (switch) your investment option in your pension account. Please note a cut-off time for switching investment options applies – see Section 4 for more details.**

Thanks for filling out this form – it should only take a few minutes. To help us clearly note your details, please write in BLOCK LETTERS and use a black or blue pen. Don't forget to sign and date it before you email it (and any attachments) to us at pension@rest.com.au – without your signature and date this form won't be valid. You can also mail this form to: PO Box 350, Parramatta NSW 2124.

All fields marked with \* are required.

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## Section 1: Personal Details

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Member number\*

Date of birth\*

Salutation

Given Name(s)\*

Surname\*

Address

Suburb/Town

State

Postcode

Mobile

Email

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## Section 2: Investment choice

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Please fill out the section below to indicate how you would like your pension balance split between the different investment options.

Balance split (%)

Cash	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Capital Stable	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Balanced (Rest Pension default)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Balanced - Indexed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Growth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Sustainable Growth	<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"/> %
Australian Shares - Indexed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
Overseas Shares - Indexed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
<b>Total</b>	<b>100.00%</b>

### Section 3: How would you like your withdrawals to be paid

Your withdrawals, including pension payments, fee and other charges can only be drawn from the investment options you nominated in Section 2. Please select only one type of payment option:

- Percentage of each investment option you would like Rest to use to pay your future withdrawals in the Withdrawal split (%) column or;
- the order of investment option(s) you would like Rest to pay your future withdrawals by entering 1 to 9 for all your investment options in the Withdrawal split (#) column.

If you don't select an option, your payments will be paid in the same proportions as your balance split (%) selection nominated in Section 2.

	Withdrawal split (%)	Withdrawal split (#)
Cash	○○○○.○○%	○
Capital Stable	○○○○.○○%	○
Balanced (Rest Pension default)	○○○○.○○%	○
Balanced – Indexed	○○○○.○○%	○
Growth	○○○○.○○%	○
Sustainable Growth	○○○○.○○%	○
High Growth	○○○○.○○%	○
Australian Shares – Indexed	○○○○.○○%	○
Overseas Shares – Indexed	○○○○.○○%	○
<b>Total</b>	<b>100.00%</b>	

### Section 4: Declaration

Please direct my current balance and all future withdrawals (including pension payments, fees and charges) made by me and/or on my behalf to the investment option(s) that I have nominated on this form.

I declare that:

I have read and understood the information in the Product Disclosure Statement (PDS) on Rest's website and on this form and I understand:

- the investment choices available
- how I can change my investment choice
- the investment strategies and objectives for each investment option
- that I can find information about the available investment options in the current PDS, Target Market Determination and on Rest's website at any time
- that the investment switch may incur buy-sell spread costs
- that the Trustee may close and/or terminate any investment option at any time
- that the following conditions apply to this investment choice:
  - if my switch request is received:
    - before 4pm (AEST/AEDT) on a business day, my switch will take effect two business days later,
    - at or after 4pm (AEST/AEDT) on a business day or received on a weekend or national public holiday, my switch will take effect three business days later.
  - the switch request will be in accordance with the terms on "How to switch an investment option" on [rest.com.au/investments-switch](http://rest.com.au/investments-switch)

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**Section 4: Declaration (continued)**

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- if this form has not been completed correctly, my request may not be accepted
- once my request has been accepted, it cannot be reversed although I can make another switch request if I change my mind (however this will incur additional transaction costs)
- the Trustee does not review my investment choices to determine whether they are suitable. I am responsible for any investment choices I make

Signature of applicant\*

(dd/mm/yyyy)

  

Your privacy is important to us. Our Privacy Policy sets out how your personal information is managed, and is available at [rest.com.au/privacy-policy](http://rest.com.au/privacy-policy)