



Investment Choice form (Rest Pension and Rest Term Allocated Pension)

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

Please complete this form and email a scanned copy to pension@rest.com.au or mail to: **PO Box 350, Parramatta NSW 2124**. Please write in **BLOCK LETTERS** and use a **BLACK** or **BLUE** pen. This form will be invalid if unsigned and undated.

Section 1: Personal details (fields with * are required)

Member number* Date of birth (dd/mm/yyyy)*

Mr/Mrs/Ms/Miss* Given name(s)* Surname*

Address Suburb/Town

State Postcode Mobile

Email address

Section 2: Investment choice

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

	Balance split (%)
Core Strategy	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Structured options	
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"/> %
Diversified	<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"/> %
Sustainable Growth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Member-tailored options	
Cash	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Shares	<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"/> %
Australian Shares - Indexed	<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"/> %
Overseas Shares - Indexed	<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"/> %
Total	1 0 0 . 0 0 %

[^] As a Pension member, you may only elect to have a maximum of 80% of your balance invested in the Property option. Please refer to the Property option terms and conditions in the Rest Pension Product Disclosure Statement (PDS).

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 or;
- Order of investment option you would like Rest to pay your future withdrawals by entering 1 to 15 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 (%)	OR	Withdrawal split (#)
Core Strategy	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Structured options			
Capital Stable	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Balanced (Rest Pension default)	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Balanced - Indexed	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Diversified	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
High Growth	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Sustainable Growth	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Member-tailored options			
Cash	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Bonds	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Shares	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Australian Shares	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Australian Shares - Indexed	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Overseas Shares	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Overseas Shares - Indexed	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Property	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		<input type="radio"/>
Total	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> . <input type="radio"/> <input type="radio"/> %		

Note: If you have selected the Property option, you are consenting to the Property Option terms and conditions in the Rest Pension PDS. These place restrictions on withdrawals, rollovers, transfers or switch requests ("Transaction Request") from that option.

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 PDS and/or 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/or on Rest's website at any time
- that the investment switch may incur buy-sell spread costs
- that the Trustee may close any investment option
- that the following conditions apply to this investment choice:
 - if a switch request is received:
 - before 4pm AEST/AEDT (Sydney time) on a business day, your switch will take effect two business days later,
 - at or after 4pm AEST/AEDT (Sydney time) on a business day or received on a weekend or national public holiday, your switch will take effect three business days later.
 - if I have chosen to invest in the Property option the terms and conditions applying to that option. I understand that property is not an asset that the Trustee can sell quickly and therefore I may not be able to switch or rollover my investment in the Property option immediately. The Trustee will normally do so within 30 days, unless redemptions have been suspended
 - the switch request will be in accordance with the terms on "How to switch an investment option" on rest.com.au/investments-switch
 - 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*

Date (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.