

# Mercy Super Income Stream

## Changing your investment options

**This form is for use by members with a Pre-Retirement or Post-Retirement Income Stream account.**

You can change how your super is invested in Mercy Super at any time. Simply choose the investment options available to you as shown in your Product Disclosure Statement 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, 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 your Product Disclosure Statement, or other documentation provided, for details about the investment choices and options available under the Fund.

You can submit your change electronically – just log in to your account via **Member Online** from our website [mercysuper.com.au](http://mercysuper.com.au).

**Note:** Any change to your investment options you make by completing this form will be effective from the date the change is processed on your account. This may be several days after the completed form is received by Mercy Super.

### If you need help

For assistance call the Helpline on (07) 3163 8880.

Step 1 – Complete your personal details		<i>Please print in black or blue pen, in uppercase, one character per box.</i> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; padding: 2px 5px;">A</div> <div>✓</div> </div>
Title Mr <input type="radio"/> Mrs <input type="radio"/> Ms <input type="radio"/> Miss <input type="radio"/> Other <input style="width: 30px; height: 20px;" type="text"/>	Date of birth <input style="width: 30px; height: 20px; border: 1px solid black;"/> <input style="width: 30px; height: 20px; border: 1px solid black;"/> / <input style="width: 30px; height: 20px; border: 1px solid black;"/> <input style="width: 30px; height: 20px; border: 1px solid black;"/> / <input style="width: 30px; height: 20px; border: 1px solid black;"/> <input style="width: 30px; height: 20px; border: 1px solid black;"/>	
Given names <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
Surname <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
Residential address <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
Suburb <input style="width: 60%; height: 20px; border: 1px solid black;"/>	State <input style="width: 20%; height: 20px; border: 1px solid black;"/>	Postcode <input style="width: 20%; height: 20px; border: 1px solid black;"/>
Postal address (if different to above) <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
Suburb <input style="width: 60%; height: 20px; border: 1px solid black;"/>	State <input style="width: 20%; height: 20px; border: 1px solid black;"/>	Postcode <input style="width: 20%; height: 20px; border: 1px solid black;"/>
Daytime Telephone <input style="width: 30%; height: 20px; border: 1px solid black;"/> - <input style="width: 30%; height: 20px; border: 1px solid black;"/>	Mobile <input style="width: 30%; height: 20px; border: 1px solid black;"/> - <input style="width: 30%; height: 20px; border: 1px solid black;"/>	
E-mail <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
Membership number <input style="width: 100%; height: 20px; border: 1px solid black;"/>		
<b>Continued over</b>		



## Step 2 – 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 payments are drawn (see Step 3).

### Switch by percentage (%)

You can choose up to 5 investment options in any percentage. Please ensure the total adds to 100% otherwise this form will not be processed and your investment allocations will remain unchanged.

#### Percentage to be invested

Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Stable	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TOTAL				<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0%

## Step 3 – Choose your investment options for your Income Stream

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

### New Percentage (%)

You can choose to have your 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 the 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.

#### Percentage of each payment

Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Stable	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TOTAL				<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0%



## Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on (07) 3163 8880.

Our Privacy Policies are available to view at [www.mercysuper.com.au](http://www.mercysuper.com.au) or you can obtain a copy by contacting us on (07) 3163 8880. If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on (07) 3163 8880 or write to our Privacy Officer, PO Box 8334, Woolloongabba Queensland 4102

## Step 4 – Sign the form

By signing this form I understand that:

- Changes will be effective from the date the change is processed by the Fund.
- No request will be actioned if the information is incomplete or ambiguous.
- The information on this form will be handled by the Trustee to process my investment option choice
- If I've provided my email address details and/or mobile number in this form, the Trustee may, at its discretion, in the future use that email address and/or mobile number to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means
- I consent to my information being collected, disclosed and used in the manner set out in this form and the Mercy Super Privacy Statement.

Signature

X

Date

/   /

**Please return your completed form to: Mercy Super, PO Box 8334, Woolloongabba, QLD, 4102.**

