



HESTA income stream investment switch form



Use this form to change your investment options. Please complete the form by typing information or if writing use CAPITAL LETTERS. Print 'X' to mark boxes where applicable.

1. Personal details

Member number:

Given name/s:

Family name:

Date of birth:

D

D

M

M

Y

Y

Y

Y

Residential address (PO Box not accepted):

Suburb

State/Terr.

Postcode

Postal address (only complete if different from above):

Suburb

State/Terr.

Postcode

Mobile or daytime phone number:

Email:

2. Select your new investment option(s)

Alter my asset allocation to be:

Investment options	% of total
Conservative	<div><div></div><div></div><div></div></div> %
Balanced Growth	<div><div></div><div></div><div></div></div> %
Indexed Balanced Growth	<div><div></div><div></div><div></div></div> %
Sustainable Growth	<div><div></div><div></div><div></div></div> %
High Growth	<div><div></div><div></div><div></div></div> %
Cash and Term Deposits	<div><div></div><div></div><div></div></div> %
Diversified Bonds	<div><div></div><div></div><div></div></div> %
Property and Infrastructure	<div><div></div><div></div><div></div></div> %
International Shares	<div><div></div><div></div><div></div></div> %
Australian Shares	<div><div></div><div></div><div></div></div> %
Total (must add up to 100%)	<div><div></div><div></div><div></div></div> %

If you have online access to your account, you can submit your request online at hesta.com.au/login

Not accessed your account online yet? Visit hesta.com.au/register

3. Select your draw down option(s)

Indicate how you would like to draw down your income payments. You can:

☐

Choose to have the income payments withdrawn from each investment in proportion to the balance in each investment option at the time of payment

or

☐

Choose the order of investments from which you would like to drawdown your income payments (e.g. 1 to 10)

Investment options	Priority (e.g. 1, 2)
Conservative	<div><div></div><div></div><div></div></div>
Balanced Growth	<div><div></div><div></div><div></div></div>
Indexed Balanced Growth	<div><div></div><div></div><div></div></div>
Sustainable Growth	<div><div></div><div></div><div></div></div>
High Growth	<div><div></div><div></div><div></div></div>
Cash and Term Deposits	<div><div></div><div></div><div></div></div>
Diversified Bonds	<div><div></div><div></div><div></div></div>
Property and Infrastructure	<div><div></div><div></div><div></div></div>
International Shares	<div><div></div><div></div><div></div></div>
Australian Shares	<div><div></div><div></div><div></div></div>

or

☐

Choose the percentage of investments from which you would like to draw down your income payments.

Investment options	% of total
Conservative	<div><div></div><div></div><div></div></div> %
Balanced Growth	<div><div></div><div></div><div></div></div> %
Indexed Balanced Growth	<div><div></div><div></div><div></div></div> %
Sustainable Growth	<div><div></div><div></div><div></div></div> %
High Growth	<div><div></div><div></div><div></div></div> %
Cash and Term Deposits	<div><div></div><div></div><div></div></div> %
Diversified Bonds	<div><div></div><div></div><div></div></div> %
Property and Infrastructure	<div><div></div><div></div><div></div></div> %
International Shares	<div><div></div><div></div><div></div></div> %
Australian Shares	<div><div></div><div></div><div></div></div> %
Total (must add up to 100%)	<div><div></div><div></div><div></div></div> %

4. Investment options

1. Is your investment choice guided by receiving personal financial advice?

- ☐ Yes, I've seen a financial adviser
- ☐ No, I'm comfortable making my own choice.

2. In which investment setting would you be more comfortable? You can select more than one option to indicate you have a range of investment needs.

- ☐ Higher investment volatility, investing predominantly in growth assets for highest expected returns.
- ☐ High investment volatility, mostly invested in growth assets for higher expected returns.
- ☐ Moderate investment volatility, investments split between growth and defensive assets for modest expected returns.
- ☐ Some investment volatility, small amount of growth, mostly investing in defensive assets for lower expected returns.
- ☐ Very little investment volatility, little to no growth, investing in defensive assets for lowest expected returns.

5. Member declaration

- I confirm the details I have supplied are true and correct and instruct the trustee of HESTA to process my request in accordance with the provisions of the HESTA Trust Deed available at hesta.com.au/disclosures or by calling 1800 813 327.
- I acknowledge that, before I sign this form, I have read and understand the *HESTA Income Stream Product Disclosure Statement* available at hesta.com.au/pds or by calling 1800 813 327 and understand that the information is a general outline of the investment options offered and does not constitute personal investment advice. I acknowledge the trustee of HESTA has advised me to consider obtaining financial advice.
- I understand if my investment switch request is received by 4pm AET on a business day it will receive the unit price calculated at the close of the next business day. If my investment switch request is received after 4pm AET on a business day or received on a non-business day it will be treated as if it was received the next business day.
- I understand past performance is not a reliable indicator of future performance.
- I have read and understood HESTA's Privacy Collection Statement which is available at hesta.com.au/privacy or by calling 1800 813 327. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.
- By providing my email address and/or phone number, I nominate those as my up-to-date contact details, and consent to HESTA providing me with information about HESTA's products and services, as well as marketing communications including third party products and services.

Signature:

Date:

Return your completed and signed form to hestais@hesta.com.au or mail to: HESTA, Locked Bag 35007, Collins St West VIC 8007.

If you have any questions about completing this form, call us on 1300 734 479 between 8.00am and 8.00pm (AET) Monday to Friday.

contact us

hesta@hesta.com.au | 1800 813 327 | Locked Bag 35007, Collins St West VIC 8007 | hesta.com.au

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