

# HESTA income stream investment switch form

# HESTA

**Complete this form if you would like to change your investment options.**

Please complete the form in black pen using BLOCK letters. Print 'X' to mark boxes where applicable. The form must be completed in full.

**Return your completed form**

Scan and email all requirements to [hestais@hesta.com.au](mailto:hestais@hesta.com.au) or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124.

**Did you know?**

If you have online access to your account, you can submit your request online at [hesta.com.au/mol](http://hesta.com.au/mol)

Not online yet? Call 1300 734 479 to register.

**1 Personal details**

Income Stream member number:

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Title: Ms  Mrs  Miss  Mr  Dr  Other

Gender: F  M

Given name/s:

Family name:

Date of birth:

D	D	M	M	Y	Y	Y	Y
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Telephone number (home):

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Telephone number (mobile):

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**2 Select your new investment option(s)**

**!** HESTA Income Stream provides two free switches per financial year, after which a switching fee is payable when you switch your investments (see the **HESTA Income Stream Product Disclosure Statement** for details). Before switching, we strongly recommend you speak to a financial adviser.

Alter my asset allocation to be:

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

**3 Select your new investment 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Choose to have the income payments withdrawn from each investment in proportion to the balance in each investment option at the time of payment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	
Balanced Growth ( <i>MySuper</i> )	
Indexed Balanced Growth	
Sustainable Growth	
High Growth	
Cash and Term Deposits	
Diversified Bonds	
Property and Infrastructure	
International Shares	
Australian Shares	

or

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

**Investment options**

**% of total**

Conservative			%
Balanced Growth ( <i>MySuper</i> )			%
Indexed Balanced Growth			%
Sustainable Growth			%
High Growth			%
Cash and Term Deposits			%
Diversified Bonds			%
Property and Infrastructure			%
International Shares			%
Australian Shares			%
<b>Total</b> (must add up to 100%)			%

**Note:** If you do not make a valid nomination above, payments will be drawn down in the same proportion/sequence as you have currently recorded.

**!** Please complete the declaration over the page.

## 4 Member declaration

- I declare I am the HESTA member whose details appear on this form.
- 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.
- I declare I have read and understood the information contained in the current HESTA Income Stream Product Disclosure Statement and 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 have read and understood the HESTA Privacy Collection Statement available at [hesta.com.au/privacy](https://hesta.com.au/privacy), and consent to the trustee of HESTA collecting, using and disclosing my personal information.
- I understand if my switch request is received before 11.59pm (AET) Tuesday, your switch will be processed the immediate Friday using prices calculated at the end of the day on the Tuesday. Any switch requests received after 11:59pm (AET) Tuesday will be processed the Friday of the following week using the prices calculated the next Tuesday. Where the Tuesday is a national public holiday the unit price will be calculated using the last available business day's valuation. Where a public holiday falls on a Wednesday or Thursday, unit prices calculated on the Tuesday and switch requests received by 11:59pm (AET) will be applied on the immediate Saturday instead of Friday.
- I understand past performance is not a reliable indicator of future performance.

Signature:

Date:

### Return your completed form

Scan and email all requirements to [hesta@hesta.com.au](mailto:hesta@hesta.com.au)

or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

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

We cannot accept faxed requests.

## contact us

[hesta@hesta.com.au](mailto:hesta@hesta.com.au) | 1800 813 327 | Email forms to [hesta@hesta.com.au](mailto:hesta@hesta.com.au) or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

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