

# HESTA income stream investment switch form

**Complete this form if you would like 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. 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/login](https://hesta.com.au/login)

Not accessed your account online yet? Visit [hesta.com.au/register](https://hesta.com.au/register)

**1 Personal details**

Income Stream member number:

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Title: Ms  Mrs  Miss  Mr  Dr  Other

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)**

Alter my asset allocation to be:

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

**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Choose to have the income payments withdrawn from each investment in proportion to the balance in each investment option at the time of payment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 (*MySuper*)
- 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 (*MySuper*)
- Indexed Balanced Growth
- Sustainable Growth
- High Growth
- Cash and Term Deposits
- Diversified Bonds
- Property and Infrastructure
- International Shares
- Australian Shares
- Total** (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 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 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 acknowledge that, before I sign this form, I read and understand the *HESTA Income Stream Product Disclosure Statement* available at [hesta.com.au/pds](https://hesta.com.au/pds) or by calling 1300 734 479 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 have read and understood HESTA's Privacy Collection Statement which is available at [hesta.com.au/privacy](https://hesta.com.au/privacy) or by calling 1300 734 479. 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.
- I understand if my investment switch request is received by 4pm AEST/AEDT on a business day it will receive the unit price calculated for that business day. The switch will be applied to my account two business days later. If my investment switch request is received after 4pm AEST/AEDT 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.

Signature:

Date:

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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

[hestais@hesta.com.au](mailto:hestais@hesta.com.au) | 1300 734 479 | Email forms to [hestais@hesta.com.au](mailto:hestais@hesta.com.au) or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

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