

# investment choice application form

# HESTA

Read the Investment Choices guide carefully and consider seeking financial advice before you make any changes to your investment choice. If your completed form reaches us by 11.59pm (AET) Tuesday, your changes will be processed that week (effective that Friday).

- Note:**
- if you only fill in Column 1 (current HESTA account balance), your instructions will also apply to your future contributions and other cashflow.
  - if you do not complete Column 1 (i.e. if you only complete Column 2), we will NOT alter the investment strategy of your current account balance. All future amounts received will be invested in accordance with the the instructions in Column 2 only.
  - if multiple valid requests are submitted for the one effective date, the latest request will be implemented and earlier ones cancelled.

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

## 1 Change your current HESTA account balance

Change the investment of my **current** balance. Only complete this section if you want to change how your current account balance is invested – any details entered below will replace your existing instructions, including any special arrangements you may have made.

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

## 2 Change your future contributions and other cashflow

Change the investment of my **future** contributions and other cashflow. Only complete this section if you want to change how your future contributions and cashflow are invested – any details entered below will replace your existing instructions.

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

If you provide an incomplete form, we will not understand your request and cannot process it.

## Declaration

Member number:

Title: Ms  Mrs  Miss  Mr  Dr  Other

Given name/s:

Family name:

Postal address:

PO Box / Unit number / Street number

Street name/Suburb

State/Territory

Postcode

Date of birth:

- I declare I have read and understood the information contained in *Investment Choices* at [hesta.com.au/pds](http://hesta.com.au/pds)
- I understand the Investment Choices guide is a general outline of the investment options offered and does not constitute personal investment advice and acknowledge the Trustee of HESTA has advised me to consider seeking financial advice.
- Completed investment switches received before 11.59pm (AET) Tuesday, will be processed the immediate Friday using unit 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 declare that I have read and understand that my personal information is collected in accordance with the HESTA Privacy Collection Statement.

Signed:

Date:

## 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