

# max Super Change of Investment Choice Form

## Instructions

Please complete this form if you wish to change the way your money is invested with **max**.

- **Black** or **blue** pen please. We're not into pencil.
- Please use **BLOCK** letters.
- Please place a **tick**  in any box required.
- Any questions? Please contact the **max Team** on **1300 883 629**.
- When you've completed this form, please sign where indicated and mail to:

**max Super**  
Reply Paid 4678  
Melbourne VIC 8060 (No postage stamp required)



## Step 1 - Your Personal Details

So **max** can change your investment choice.

**max Super** Membership Number

Date of Birth

 /  / 

Mr/Mrs/Ms/Miss First Name

Last Name

## Step 2 - Investment Choice (Existing Balance)

Tell **max** where to put your cash!

### How would you like your money invested?

Tell us how you would like your **Existing Balance** invested. Please refer to the PDS or the **max Super** website for more information on investment options. **max** offers three ways to select your Investment option.

I would like to invest my **Existing Balance** in:

**Option 1 – Default**  
Go with the default fund. **OR**

**Living Large Fund (default fund)**  
75% Growth Assets  
25% Income Assets

**Option 2 – Pre-mixed**  
Select one of our 5 pre-mixed funds. **OR**

- Growth Fund**  
100% growth assets
- Living Large Fund**  
75% growth assets, 25% income assets
- Fence Sitter Fund**  
50% growth assets, 50% income assets
- Slow and Steady Fund**  
30% growth assets, 70% income assets
- Income Fund**  
100% income assets

**Option 3 – Choose your own adventure**  
Choose your own adventure and pick any mix of Asset options and pre-mixed funds. Total must equal 100%.

- % **Growth Fund**  
100% growth assets
- % **Living Large Fund**  
75% growth assets, 25% income assets
- % **Fence Sitter Fund**  
50% growth assets, 50% income assets
- % **Slow and Steady Fund**  
30% growth assets, 70% income assets
- % **Income Fund**  
100% income assets
- % **Australian shares**
- % **International shares**
- % **Australian fixed interest**
- % **International fixed interest**
- % **Listed property securities**
- % **Cash**

Total must equal 100%



## Step 3 - Investment Choice (Future Contributions) Tell **max** where to put your future cash!

### How would you like your money invested?

Tell us how you would like your **Future Contributions** invested. Please refer to the PDS or the **max Super** website for more information on investment options. **max** offers three ways to select your investment option

I would like to invest my **Future Contributions** in:

**Option 1 – Default**  
Go with the default fund.

OR

**Option 2 – Pre-mixed**  
Select one of our 5 pre-mixed funds.

OR

**Option 3 – Choose your own adventure**  
Choose your own adventure and pick any mix of Asset options and pre-mixed funds. Total must equal 100%.

**Living Large Fund (default fund)**  
75% Growth Assets  
25% Income Assets

**Growth Fund**  
100% growth assets

**Living Large Fund**  
75% growth assets, 25% income assets

**Fence Sitter Fund**  
50% growth assets, 50% income assets

**Slow and Steady Fund**  
30% growth assets, 70% income assets

**Income Fund**  
100% income assets

% **Growth Fund**  
100% growth assets

% **Living Large Fund**  
75% growth assets, 25% income assets

% **Fence Sitter Fund**  
50% growth assets, 50% income assets

% **Slow and Steady Fund**  
30% growth assets, 70% income assets

% **Income Fund**  
100% income assets

% **Australian shares**

% **International shares**

% **Australian fixed interest**

% **International fixed interest**

% **Listed property securities**

% **Cash**

Total must equal 100%



## Step 4 - Declaration

Here comes **max**, the autograph hound.

- I have read the Investment Options section of the **max Super** (PDS)
- I understand the investment options available in **max Super** and request my Existing Balance and/or Future Contributions be invested as shown in this application;
- I understand that the trustee is not responsible for my choice and I accept the investment risks and rewards of the investment options I choose;
- I understand that this request will apply to my Existing Balance and/or my Future Contributions as at the date that **max Super** processes this request;
- I have read and understand the **max Super** Privacy Statement in the PDS.
- I understand that **max Super** may share my personal information with Max Super Pty Ltd or its related entities for the purposes of letting me know about other **max** products and services that might be of interest to me. If I don't want **max Super** to share my information, I can let them know by giving them a call on **1300 883 629**.

Your Signature

Date

/    /

