

Pension Investment Switch Form



This form can be used to:

- change the investment option(s) for your current account balance; and/or
- change the investment options(s) for future pension payments to be withdrawn from

Your completed form must be received by the last business day of the month in order for your switch to come into effect from the 1st of the following month.

Personal Details

Title: Mr / Mrs / Miss / Ms (please circle one) Date of Birth: _____
Surname: _____ Given Names: _____
Residential Address: _____
Suburb: _____ State: _____ Postcode: _____
Postal Address: _____
Suburb: _____ State: _____ Postcode: _____
Phone number: _____ Email: _____

Investment option

Please advise how you wish your current balance to be invested by advising the percentage to be allocated to each investment option OR by requesting a dollar amount by switched from one option to the other.

If you have more than one investment option, you must also advise which option pension payments are to be withdrawn from.

CURRENT BALANCE

Investment option	% investment
Cash option	%
Balanced option	%
Growth option	%

OR

SWITCH A DOLLAR AMOUNT BETWEEN OPTIONS

Amount to switch	\$
From option:	Cash, Balanced or Growth (delete two)
To option:	Cash, Balanced or Growth (delete two)

I wish for my pension payments to be withdrawn as follows:

PENSION PAYMENTS

Investment option	% of each pension
Cash option	%
Balanced option	%
Growth option	%

Signature and Declaration

By signing this form, I acknowledge:

- that the Trustee shall not be liable for any loss due to my choice of investment option; and
- my investment change will be effective from the first day of the month following receipt of this form.

Signature

Date

Please send your completed form to:

CBH Superannuation Fund, 30 Delhi Street West Perth WA 6005

Phone: (08) 9237 9707 Fax: (08) 9322 3942 Email: donna.adam@cbh.com.au

Date: 31 October 2018

CBHSuper

Issued by CBH Superannuation Holdings Pty Ltd ABN: 99 008 684 268
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