



# Investment choice

## RI Term Allocated Pension



This form allows you to change your RI Term Allocated Pension investment plan. To change any other information, contact your Member Services Centre on 13 43 72.

### Section 1 Your details

GESB member number

WIN No. Office Use Only

RI Term Allocated Pension account number

Mr  Mrs  Miss  Ms  Other

Surname (family name)

Given name(s)

Date of birth  /  /  Male  Female

Postal address

Postcode

Email address

Telephone - home Telephone - work

( ) ( )

Telephone - mobile

### Section 2 Change your investment plans

Investment plan details are available at [gesb.wa.gov.au/tapinvestmentchoice](http://gesb.wa.gov.au/tapinvestmentchoice)

If you need more help, call your Member Services Centre on 13 43 72.

#### Readymade plans

Select ONE option from the Readymade plans:

- Growth plan
- Balanced plan
- Conservative plan
- Cash plan

#### OR

- 'Mix Your' plan (see option C over page)

✓ option A or B or C.

A.  Choose one Readymade plan only:

Print the full name of the investment plan you wish to select in the box below:

 plan

Your pension payment will be paid from your selected investment plan.

#### OR

B.  A percentage to be invested in the Cash plan:

Cash plan  %

and the remainder in the following Readymade plan:

 plan

#### AND

Pay my pension as a percentage from the following investment plans **or** pay my pension in the following order.

Percentage or order (1 or 2)

Cash plan  %

Other chosen investment plan  %

Your selection must total 100% **TOTAL**  100%

(option C continued over page)



**OR**

C.  'Mix Your' plan

Only select 'Mix Your' plan if you don't wish to select one of the four Readymade plans.

If you choose 'Mix Your' plan, you will need to build your investment mix by choosing 5% multiples in one or more of the asset classes listed, to total 100%.

Asset class	(in 5% multiples)
Australian Shares	<input type="text"/> %
International Shares	<input type="text"/> %
Property	<input type="text"/> %
Fixed Interest	<input type="text"/> %
Cash	<input type="text"/> %
Your selection must total 100%	<b>TOTAL</b> <input type="text" value="100%"/>

**AND**

Pay my pension from the following asset classes (ensure the total equals 100%) **or** pay my pension from the asset classes in the following order (indicate first, second, etc).

	Percentage	or order
Australian Shares	<input type="text"/> %	<input type="checkbox"/>
International Shares	<input type="text"/> %	<input type="checkbox"/>
Property	<input type="text"/> %	<input type="checkbox"/>
Fixed Interest	<input type="text"/> %	<input type="checkbox"/>
Cash	<input type="text"/> %	<input type="checkbox"/>
Your selection must total 100%	<b>TOTAL</b> <input type="text" value="100%"/>	

**Section 3 Declaration and signature**

When making an investment choice and in signing this form I acknowledge that:

- I understand the information serves as a general guide only and does not contain personal financial advice. I have read the RI Term Allocated Pension investment choice information available at [gesb.wa.gov.au/tapinvestmentchoice](http://gesb.wa.gov.au/tapinvestmentchoice)
- GESB will invest my money according to my choice of investment plan(s) and is not responsible for my choice
- GESB will endeavour to process my choice of investment plan(s) within five working days of receiving this form
- I understand that once my investment choice request has been accepted, it cannot be reversed. Any further investment plan changes that are lodged will only take effect once the previous request has been completed

Your signature  Date

**More information**

- We will send you a confirmation notice upon completion of your instructions
- For more information visit [gesb.wa.gov.au](http://gesb.wa.gov.au) or call your Member Services Centre on 13 43 72

Send your completed form to:

**GESB**  
**PO Box J 755**  
**Perth WA 6842**

Or fax it to:

**Facsimile: 1800 300 067**

Note: we have a privacy statement to explain how we handle private information about individuals responsibly. Our privacy statement is available on our website or can be obtained by contacting your Member Services Centre.

 **How to contact us**

**T** Member Services Centre 13 43 72  
PO Box J 755, Perth WA 6842

**F** 1800 300 067

**W** [gesb.wa.gov.au](http://gesb.wa.gov.au)