



Did you know you can make an investment choice in Member Online at any time?

Simply log into Member Online at mol.gesb.wa.gov.au, go to the 'Investments' tab and choose the 'change plan' option.

Otherwise, complete this form to change your investment plan for your RI Term Allocated Pension.

We will process your investment switch on the first available day after receiving it. Generally, within two to three business days of receiving your request. However, sometimes it may take up to five business days to process your switch. A business day is a work day other than a public holiday or weekend in Western Australia.

Please keep in mind that your investment switch will take effect on the day it's processed, rather than on the day it's received. The day we process your switch is known as the 'effective date'.

The unit price on the 'effective date' will be applied to the transaction. Once this process is complete, the changes to your investment plan will take effect immediately.

For more information, visit gesb.wa.gov.au/investmentswitch.

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 (if different from residential)

Postcode

Email address

Telephone – home

()

Telephone – work

()

Telephone – mobile

Section 2 Choose your investment plan

For more information on your RI Term Allocated Pension investment options, please visit gesb.wa.gov.au/tapinvestmentchoice

If you need more help, please call your Member Services Centre on 13 43 72 between 7.30am and 5.30pm (AWST), Monday to Friday.

Readymade plans

Select ONE option from our 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 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%

- ☐ Update my drawdown percentage and/or drawdown order only. I do not wish to change my asset classes.

(option C continued over page)



OR

C. ☐ Mix Your plan

Only select Mix Your plan if you don't wish to invest in any of the 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%	TOTAL <input type="text"/> 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="text"/>
International Shares	<input type="text"/> % <input type="text"/>
Property	<input type="text"/> % <input type="text"/>
Fixed Interest	<input type="text"/> % <input type="text"/>
Cash	<input type="text"/> % <input type="text"/>
Your selection must total 100%	TOTAL <input type="text"/> 100%

☐ Update my drawdown percentage and/or drawdown order only. I do not wish to change my asset classes.

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
- GESB will invest my money according to my choice of investment plan(s) and is not responsible for my choice
- While GESB aims to process my investment choice within two to three business days after receiving my completed form, it may take up to five business days, or longer in exceptional cases, for my request to be processed
- My investment switch will take effect on the day it's processed, and not on the day it's received by GESB
- GESB cannot guarantee the unit price that will apply to my investment switch
- Once my investment choice has been accepted, it cannot be cancelled or reversed. Any further changes to my plan won't be processed until this request has been completed
- As RI Term Allocated Pension is linked to the performance of financial markets, changing my investment plan when the market is fluctuating may negatively impact the value of my account

Your signature

x / /

Date

More information

- After we have processed the changes to your investment plan, we will confirm this with you in writing, including the unit price that applied to your switch
- You will be able to see the details of the transaction in Member Online, usually within five business days of the 'effective date' of your switch
- For more information, visit gesb.wa.gov.au/investmentswitch 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 that explains how we handle private information about individuals responsibly. Our privacy statement is available on our website at gesb.wa.gov.au/privacy or can be obtained by contacting your Member Services Centre on 13 43 72.

 **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