

To request this document in an alternative format such as Braille, call us on 13 43 72 or use our Live chat service at [gesb.wa.gov.au](https://gesb.wa.gov.au).



### 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](https://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 West State Super account.

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.

Please note, if you switch your investment plan, all of your units will be sold and then new units bought according to your new plan.

For more information, visit [gesb.wa.gov.au/investmentswitch](https://gesb.wa.gov.au/investmentswitch).

### Section 1 Your details

GESB member number

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Last name

Given name(s)

Date of birth  /  /  Male ☐ Female ☐

Postal address (if different from residential)

Postcode

Email address

Mobile phone number Work phone number

 ( ) 

### Section 2 Choose your investment plan

To find out more about the features of each investment plan, read our '**West State Super Product Information Booklet**' and '**Investment choice**' brochure at [gesb.wa.gov.au/brochures](https://gesb.wa.gov.au/brochures).

✓ option A or B

A. ☐ Readymade plan

Select ONE option from our Readymade investment plans:

- Growth plan ☐
- My West State Super plan ☐
- Sustainable Balanced plan ☐
- Conservative plan ☐
- Cash plan ☐

The total balance of your West State Super account will be allocated to your chosen investment plan.

OR

B. ☐ Mix Your plan

Only select Mix Your plan if you don't wish to invest in any of the Readymade plans.

If you choose the Mix Your plan option, 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  %

International Shares  %

Property  %

Fixed Interest  %

Cash  %

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

Please note, if you're changing your Mix Your plan investment mix, you'll cancel any automatic rebalancing you've previously requested. If you would like us to automatically rebalance your new investment mix, please complete section 3.

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### Section 3 Rebalancing (optional)

If you've selected Mix Your plan in section 2 (including your investment mix in 5% multiples), you can choose to automatically rebalance your Mix Your plan investment mix. This will ensure the percentage held in each asset class remains the same over time. Please tell us how often you would like this to happen:

- ☐ Quarterly (on the 15th of March, June, September and December)
- ☐ Twice a year (on the 15th of June and December)
- ☐ Once a year (on the 15th of June)

If you choose automatic rebalancing, we will rebalance your investment mix on the 15th day of the month, according to the option selected.

Please note, if you automatically rebalance your Mix Your plan, all of your units will be sold and then new units bought to match your selection.

Each time you change your Mix Your plan, you will need to choose to automatically rebalance your plan if you wish to continue with this option.

### Section 4 Declaration and signature

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

- I have read the '**West State Super Product Information Booklet**' and '**Investment choice**' brochure and understand they serve as general information only, and do not contain personal financial advice
- GESB will invest my super according to my choice of investment plan 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 West State Super 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](https://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](https://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

**F** 1800 300 067

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

PO Box J 755, Perth WA 6842