



# Investment choice Retirement Income Pension

## RI Allocated Pension and Transition to Retirement Pension



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](http://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](http://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 Allocated Pension or Transition to Retirement 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.

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](http://gesb.wa.gov.au/investmentswitch).

### Section 1 Your details

GESB member number

WIN No. Office Use Only

Retirement Income Pension account 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 Change your investment plans

Please choose from the investment options available with your Retirement Income Pension account. For example, if you tick 'Growth plan/Growth plan TTR' under option A, your account will be invested in our Growth plan if you're an RI Allocated Pension member, or in our Growth plan TTR if you're a Transition to Retirement Pension member.

For more information on our retirement investment options, please visit [gesb.wa.gov.au/retirementplans\\_ri](http://gesb.wa.gov.au/retirementplans_ri) or read our 'Retirement Income Pension Product Information Booklet' at [gesb.wa.gov.au/brochures](http://gesb.wa.gov.au/brochures).

#### Readymade plans

Select ONE option from our Readymade plans:

- Growth plan/Growth plan TTR
- Sustainable Balanced plan – this option is only available for RI Allocated Pension members
- Balanced plan/Balanced plan TTR
- Conservative plan/Conservative plan TTR
- Cash plan/Cash plan TTR

#### 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 TTR:

Cash plan/Cash plan TTR  %

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 <b>or</b> order<br>(1 or 2) |                      |                          |
| Cash plan/Cash plan TTR        | %                                      | <input type="text"/> | <input type="checkbox"/> |
| Other chosen investment plan   | %                                      | <input type="text"/> | <input type="checkbox"/> |
| Your selection must total 100% | <b>TOTAL</b>                           | <b>100%</b>          |                          |

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

**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%.

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

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

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 have read the **'Retirement Income Pension Product Information Booklet'**. I understand it serves as a general guide only and does not contain personal financial advice
- 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 Allocated Pension and Transition to Retirement Pension are 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                 | Date                             |
| <input type="text" value="x"/> | <input type="text" value="/ /"/> |

**More information**

- We'll send you confirmation once we have processed the changes to your investment plan
- 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](http://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](http://gesb.wa.gov.au/privacy) or can be obtained by contacting your Member Services Centre on 13 43 72.