



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.

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 and go to the 'Investments' tab. Otherwise, complete this form to change your investment option 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 option will take effect immediately.

Please note, if you switch your investment option(s), all your units will be sold and then new units bought according to your newly selected investment option(s). There is no fee to change your option(s).

For more information, visit 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 option

Please choose from the investment options available with your Retirement Income Pension account. You can select any combination of options in 1% increments. If you would like to invest in one option, please enter 100%.

For more information on our retirement investment options, please visit gesb.wa.gov.au/retirementplans_ri or read our 'Retirement Income Pension Product Information Booklet' at gesb.wa.gov.au/brochures.

Your pension will be paid in the same proportions it is invested in. If you want to have your pension paid in different proportions or a debit order, please fill out the % of payment or Order columns accordingly.

	Investment mix (in 1% multiples)	% of payment	Order
Diversified options			
Growth/Growth TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Sustainable Balanced – this option is only available for RI Allocated Pension members	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Balanced/Balanced TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Conservative/Conservative TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Asset Class options			
Australian Shares/Australian Shares TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
International Shares/International Shares TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Property/Property TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Fixed Interest/Fixed Interest TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Cash/Cash TTR	<input type="text"/> %	<input type="text"/> % or	<input type="text"/>
Your selection must total 100%	<input type="text"/> 100%	<input type="text"/> 100%	

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

Section 3 Rebalancing (optional)

If you've selected multiple options in section 2 (including your investment mix in 1% multiples), you can choose to automatically rebalance your investment mix. This will ensure the percentage held in each option 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 options, all of your units will be sold and then new units bought to match your selection.

Each time you change your investment options, you will need to choose to automatically rebalance 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 '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 option(s) and is not responsible for my choice
- While GESB aims to process your request within two to three business days, it can take five business days or longer in exceptional cases. A business day is a work day other than a public holiday or weekend in WA
- My investment switch will take effect on the day it's processed, and not on the day it's received by GESB. The day we process your switch is known as the 'effective date'

- The unit price on the effective date of your switch will be applied to the transaction. GESB cannot guarantee the unit price that will apply to your investment switch
- Once my investment choice has been accepted, it cannot be cancelled or reversed. Any further changes to my option 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 your investment option(s) will impact your account balance over time. If you are changing to a more conservative investment option, this may reduce risk but could also result in a lower account balance over the long term, compared with a higher-risk option

Your signature

x

Date

/ /

Important:

Digital signatures and digitally signed forms are not accepted.

More information

- We'll send you confirmation once we have processed the changes to your investment option
- 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

Once you have completed this form, please return it to us either by:

Post

GESB
PO BOX J 755
Perth WA 6842

Email

memberservices@gesb.com.au

Fax

Australia: 1800 300 067
Overseas: +61 8 9262 6702

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 F 1800 300 067
PO Box J 755, Perth WA 6842

W gesb.wa.gov.au