

Investment Switch Form

Acclaim Core Super & Pension

Acclaim
WEALTH



Before signing this *Investment Switch* form, please ensure that you have read the applicable Product Disclosure Statement (PDS) and current Additional Information Booklet (AIB) available from www.acclaimwealth.com.au.

Please note:

- FROM FUND total must equal TO FUND total
- Please note that all investment switches will be arranged as part of our weekly investment cycle, in the week following the receipt of your *Investment Switch* form. The size and type of investment which you will be redeeming from and investing into, will determine how long it takes for your investment switch to be completed.

Section 1: Personal details

Surname:	<input type="text"/>	Salutation:	<input type="text"/>
Given name(s):	<input type="text"/>	Date of birth:	<input type="text"/>
Postal address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
		Postcode:	<input type="text"/>
Telephone (BH):	<input type="text"/>	(AH):	<input type="text"/>
		Mobile:	<input type="text"/>
Email:	<input type="text"/>	Membership number:	<input type="text"/>

Section 2: Switch instruction for existing investment mix

I understand the following instructions will apply to the total balance of my account:

FROM FUND (Fund you want to REDEEM from)	Amount (\$) or %	TO FUND (Fund you want to INVEST to)*	Amount (\$) or %
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL	<input type="text"/>	TOTAL	<input type="text"/>

Section 3: Switch instructions for future contributions

I request the Trustee to invest any future contributions as outlined in Section 2 of this form: Yes No

I request the Trustee to invest any future contributions as follows:

Investment Option	Percentage (%)
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
TOTAL	100%

Acclaim-Core_Investment-Switch-Form_26082022

Section 4: Target market assessment

The target market determination (TMD) for the Fund can be found at www.acclaimwealth.com.au/product-documents and includes a description of who the product is appropriate for, based upon the characteristics of the product, and the likely investment objectives, financial situation and needs of the consumer that each product had been designed to meet.

Investment options available through the Fund will also have their own TMD. A consumer must refer to the TMD and relevant disclosure documents when deciding if these products are suitable for them.

Please answer the following questions so that we can meet our regulatory obligations to take reasonable steps to ensure our products are distributed in line with those TMDs.

Which of these investment goals best describes your primary investment objective?

Capital growth Capital preservation Capital guaranteed Income distribution

Which of these statements best describes how long you expect to remain invested in this product and selected investment options?

Short term (less than 2 years) Medium term (between 2 and 8 years) Long term (more than 8 years)

Which of these statements best describes your attitude to investment risk, ability to bear loss, and return?

- Low (Unwilling to see a reduction in value of investment even in the short term. Risk of loss is low as is corresponding return.)
- Medium (Unwilling to see a reduction in the value of investment in the medium term, willing to accept some risk in the short term compensated with a higher return.)
- High (Seeking a high return from investment over the long term, willing to see a reduction in short to medium term compensated with a higher return.)
- Very high (Seeking to maximise returns and are willing to accept periods of investment losses over the lifetime of your investment. You are willing to accept the risk that can derive from the use of aggressive investment strategies such as investment in alternative assets, derivatives or from the use of leverage.)

Which of these statements best describes how long you expect withdrawals to take from the product?

Daily Weekly Monthly Quarterly Annually or longer

Section 5: Declaration and signature

By signing this form, I confirm that:

1. I have been provided with a copy and have read and understood the relevant PDS and AIB including any conditions or limitations relating to investment in the Fund or its investment options.
2. I have read, understood and agree to the handling of my personal information as outlined in the Privacy Statement in the AIB.
3. I understand that my account can rise and fall, and that neither the Trustee, nor any of its directors, Acclaim Management Group Limited, nor any of its directors, guarantee the performance of the Fund or its investment options.
4. I acknowledge that past performance is not a guide to future performance.
5. I acknowledge that the Trustee will invest my account in accordance with the selections made by me in this *Investment Switch* form (as varied by me from time to time) but that the Trustee reserves the right not to do so where necessary or appropriate without liability to any Member or prospective member.
6. The information I have provided in this form is true and correct.
7. I hereby direct the Trustee to invest my account balance in the investment options in the proportions indicated above, based on the declarations and acknowledgements made in this form.

Signature:

Date:

Please return this completed form to Acclaim Wealth PO Box 3528, Tingalpa DC Qld 4173 or email to info@acclaimwealth.com.au.

Phone: 1300 264 264 Fax: (07) 3899 7299 Website: www.acclaimwealth.com.au

We are committed to respecting the privacy of the personal information you give us.

Our formal Privacy Statement sets out how we do this. If you would like a copy of Acclaim Wealth's Privacy Statement, please let us know. We have published our Privacy Statement on our website at www.acclaimwealth.com.au.