

# Investment Switch Form

Acclaim Core Super & Pension

Acclaim  
WEALTH



THIS FORM IS INTENDED FOR ADVISER USE ONLY

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](http://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"/>
<b>TOTAL</b>	<input type="text"/>	<b>TOTAL</b>	<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"/>
<b>TOTAL</b>	<b>100%</b>

## Section 4: 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](mailto:info@acclaimwealth.com.au).**

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