



HESTA for Mercy income stream investment switch form



Complete this form if you would like to change your investment options.

Please complete the form by typing information or if writing use CAPITAL LETTERS. Print 'X' to mark boxes where applicable. The form must be completed in full.

Return your completed form

Scan and email all requirements to information@hestaformercy.com.au or mail to: PO Box 8334, Woolloongabba QLD 4102.

Did you know?

If you have online access to your account, you can submit your request online at hestaformercy.com.au/login

Not accessed your account online yet?
Visit hestaformercy.com.au/register

1 Personal details

HESTA for Mercy Income Stream member number:

Title: Ms Mrs Miss Mr Dr Other

Given name/s:

Family name:

Date of birth:

Telephone number (home):

Telephone number (mobile):

2 Select your new investment option(s)

Alter my asset allocation to be:

Investment options	% of total
Conservative	<input type="text"/> %
Balanced Growth	<input type="text"/> %
Indexed Balanced Growth	<input type="text"/> %
Sustainable Growth	<input type="text"/> %
High Growth	<input type="text"/> %
Cash and Term Deposits	<input type="text"/> %
Diversified Bonds	<input type="text"/> %
Property and Infrastructure	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
Total (must add up to 100%)	<input type="text"/> %

3 Select your new investment option(s)

Indicate how you would like to draw down your income payments. You can:

Choose to have the income payments withdrawn from each investment in proportion to the balance in each investment option at the time of payment

or

Choose the order of investments from which you would like to drawdown your income payments (e.g. 1 to 10)

Investment options

Priority (e.g. 1, 2)

Conservative

Balanced Growth

Indexed Balanced Growth

Sustainable Growth

High Growth

Cash and Term Deposits

Diversified Bonds

Property and Infrastructure

International Shares

Australian Shares

or

Choose the percentage of investments from which you would like to draw down your income payments.

Investment options

% of total

Conservative

Balanced Growth

Indexed Balanced Growth

Sustainable Growth

High Growth

Cash and Term Deposits

Diversified Bonds

Property and Infrastructure

International Shares

Australian Shares

Total (must add up to 100%)

4 Investment options

1. Is your investment choice guided by receiving personal financial advice?

- Yes, I've seen a financial adviser
- No, I'm comfortable making my own choice.

2. In which investment setting would you be more comfortable? You can select more than one option to indicate you have a range of investment needs.

- Higher investment volatility, investing predominantly in growth assets for highest expected returns.
- High investment volatility, mostly invested in growth assets for higher expected returns.
- Moderate investment volatility, investments split between growth and defensive assets for modest expected returns.
- Some investment volatility, small amount of growth, mostly investing in defensive assets for lower expected returns.
- Very little investment volatility, little to no growth, investing in defensive assets for lowest expected returns.

5 Member declaration

- I declare I am the HESTA for Mercy member whose details appear on this form.
- I confirm the details I have supplied are true and correct and instruct the trustee of HESTA to process my request in accordance with the provisions of the HESTA Trust Deed.
- I acknowledge that, before I sign this form, I read and understand the HESTA for Mercy Income Stream Product Disclosure Statement available at hestaformercy.com.au/pds or by calling 1300 368 891 and understand that the information is a general outline of the investment options offered and does not constitute personal investment advice. I acknowledge the Trustee of HESTA has advised me to consider obtaining financial advice.
- I have read and understood HESTA's Privacy Collection Statement which is available at hestaformercy.com.au/privacy or by calling 1300 368 891. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.
- I understand if my investment switch request is received by 11:59pm on a business day it will usually receive the unit price calculated for the following business day. The switch will be applied to my account three business days later. If my investment switch request is received after 11:59pm AEST/AEDT on a business day or received on a non-business day it will be treated as if it was received the next business day.
- I understand past performance is not a reliable indicator of future performance.

Signature:

Date:

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If you have any questions about completing this form, contact us on 1300 368 891 between 8:30am and 5:00pm (AET).

We cannot accept faxed requests.

contact us

1300 368 891 | Email forms to information@hestaformercy.com.au or mail to: HESTA for Mercy, PO Box 8334, Woolloongabba, QLD 4102

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