



# investment choice application form



Read the *HESTA for Mercy Investment Choices* guide carefully and consider seeking financial advice before you make any changes to your investment choice. Forms received up to 11:59pm AEST/AEDT on a business day, in most cases, will be applied to your account three business days after we receive your request and will receive the unit price at the close of the following business day.

**Note:**

- if you only fill in Section 2 (current HESTA for Mercy account balance), your instructions will also apply to your future contributions and other cashflow.
- if you do not complete Section 2 (i.e. if you only complete Section 3), we will NOT alter the investment strategy of your current account balance. All future amounts received will be invested in accordance with the the instructions in Section 3 only.
- if multiple valid requests are submitted for the one effective date, the latest request will be implemented and earlier ones cancelled.

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

## 1 Member details

Title: Ms  Mrs  Miss  Mr  Dr  Other  Given name/s:

Date of Birth:         Family name:

Member number:           Mobile number:

Preferred mailing address: PO Box/Unit number/Street number

Suburb  State/Terr.  Postcode

## 2 Change your current HESTA for Mercy account balance

Change the investment of my **current** balance. Only complete this section if you want to change how your current account balance is invested\* – any details entered below will replace your existing instructions, including any special arrangements you may have made.

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

## 3 Change your future contributions and other cashflow

Change the investment of my **future** contributions and other cashflow. Only complete this section if you want to change how your future contributions and cashflow are invested – any details entered below will replace your existing instructions.

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

#### 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 Declaration

##### If you provide an incomplete form, we will not understand your request and cannot process it.

- I acknowledge the Trustee of HESTA recommends that, before I sign this form, I read and understand *HESTA for Mercy Investment Choices* available at [hestaformercy.com.au/pds](https://hestaformercy.com.au/pds) or by calling 1300 368 891.
- I understand the *HESTA for Mercy Investment Choices* guide is a general outline of the investment options offered and does not constitute personal investment advice and acknowledge the Trustee of HESTA has advised me to consider seeking financial advice.
- I understand if I make an investment switch other than to invest all of my HESTA account balance in Balanced Growth, I am choosing to replace any interests I have in a MySuper Product with a Choice Product.
- 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 have read and understood HESTA's Privacy Collection Statement which is available at [hestaformercy.com.au/privacy](https://hestaformercy.com.au/privacy) or by calling 1300 368 891, and accept that the information on this form is true and correct to the best of my knowledge and belief. 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.

Signed:

Date:

## contact us

1300 368 891 | Email form to [information@hestaformercy.com.au](mailto:information@hestaformercy.com.au) or mail to: PO Box 8334, Woolloongabba QLD 4102

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