

Pension Investment Switch Form

Who should use this form?

You should complete this form if you have a standard pension or a pre-retirement pension and you want to change the investment option your pension account is invested in.

What is member investment choice?

Member investment choice lets you decide where your pension account is invested. You can choose an investment strategy from a range of pre-mixed investment options to best suit your individual circumstances and personal attitudes towards risk.

What are the investment options?

There are five pre-mixed investment options. Each investment option contains a different mix of asset classes to cater for different member needs and risk tolerances. You may wish to seek independent financial advice to help them choose an option that is most appropriate for their circumstances.

Conservative	30% growth assets ¹ 70% defensive assets ² A low risk option with funds invested primarily in cash and fixed interest with an expectation to achieve low to moderate returns. Developed for members whose primary focus is on the security of their assets.
Cautious	50% growth assets ¹ 50% defensive assets ² A low to moderate risk option with funds invested in a balanced mix of assets with the expectation to provide steady long term returns. Developed for members who require low to medium growth in their portfolio while having a strong focus on their security of their assets.
Growth	75% growth assets ¹ 25% defensive assets ² A moderate risk option with funds invested proportionately more in growth assets with an expectation to achieve medium to high long-term returns. Developed for members who seek a competitive level of growth in their assets.
Assertive	85% growth assets ¹ 15% defensive assets ² A moderate to high risk option with funds invested primarily in growth assets to seek higher returns over the long term. Developed for members who are looking for higher growth in their assets over the medium to long term.
Aggressive	100% growth assets ¹ 0% defensive assets ² A high risk option with funds invested wholly in growth assets. This means accepting high volatility to seek higher long term returns. Developed for members who desire high growth in their assets over the long term.

¹ Growth assets comprise two major asset classes: property and shares.

² Defensive assets comprise two major asset classes: fixed interest and cash.

When will the switch occur?

Your pension account will be switched into your elected investment option in the first week of the month after your signed form is received by the NT Superannuation Office. You will receive written confirmation when your member account has been switched to your elected investment option.

Switch fee

You can switch your pension account between investment options as many times as you like. Each member is entitled to one free switch in a financial year. Each additional switch made in a financial year will incur a \$25 switching fee which will be deducted from your pension account.

Disclaimer

The information made available in this form is intended to provide you with an election of the investor choice strategy and pre-mixed asset option in which you are entitled to invest your superannuation funds and earnings, and is provided as a guide only. The Commissioner of Superannuation and the Northern Territory Government of Australia accept no responsibility for any losses arising from any use or reliance upon the information or conclusions reached using the information.

Pension Investment Switch Form

Personal details

Name			
Residential address			
Postal address			
Email address			
Date of birth	Phone		
AGS (member no.)	Mobile		

Your member investment choice decision (tick one box only)

I want my member account balance, including my future contributions and investment earnings, placed in the following investment option:

Conservative	Cautious	Growth	Assertive	Aggressive
<input type="checkbox"/> 30% growth assets 70% defensive assets	<input type="checkbox"/> 50% growth assets 50% defensive assets	<input type="checkbox"/> 75% growth assets 25% defensive assets	<input type="checkbox"/> 85% growth assets 15% defensive assets	<input type="checkbox"/> 100% growth assets

The switch will be actioned by the Superannuation Office in the first week of the month after receiving this signed switch form.

Privacy Statement

The Northern Territory Superannuation Office is a division of Northern Territory Treasury, a Northern Territory Government Department. The privacy and confidentiality of your personal information is important to the Northern Territory Superannuation Office. We are collecting the information on this form for the purpose of administering your superannuation account. The information collected will only be used for the purpose for which it was supplied and your information will not be disclosed to any third party unless required by law or authorised by you. To obtain further information about the NT Government privacy policy or the *Information Act*, please visit the Northern Territory Government website at www.nt.gov.au.

Member declaration

- I understand that Northern Territory Superannuation Office can provide me with information but cannot give me financial advice. I understand that any information on this form is a general guide to investing and does not constitute personal financial advice.
- In regard to the five investment options, I understand that the NTGPASS Trustees are responsible for appointing the investment manager and for setting strategic asset allocation and objectives for each option to meet the needs of low, medium and high risk investors but that the Trustees are not responsible for my choice of investment option.
- I understand that I only have one free switch each financial year and my pension account will incur a fee of \$25 for any additional switches made in that financial year.
- I understand that the personal details requested on this form will only be used to administer my NTGPASS pension account.

SIGNATURE _____

DATE _____

Office use only

Checked By: Name Signature Date

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