

# Superannuation change details – (personal details and/or investment option(s))

**Return this  
completed form to:**

legalsuper  
Locked Bag 5081  
Parramatta NSW 2124  
Phone: 1800 060 312

- Personal details (complete Sections 1, 2 & 4)
- Switch your existing investments and/or change the investment of future contributions (complete Sections 1, 3 & 4)

Please use **BLOCK letters and black ink** when completing this form.  
This form will be invalid if unsigned or undated by the member (see Section 4).

You should obtain and read a copy of the current legalsuper *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document before you complete this form. These documents and all forms that you may require are available free of charge at [legalsuper.com.au](http://legalsuper.com.au) or by calling **1800 060 312** (8am to 8pm [AEST] Monday to Friday).

**Why not make these changes online at legalsuper.com.au?**

## 1. My details

legalsuper Membership Number

Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

## 2 (a). My new personal details

If you wish to change the **date of birth** or **name** that is recorded in your personal details with legalsuper, you must provide a certified copy of original documentary evidence such as a birth, marriage or deed poll certificate.

Only fill in those details which have changed. Leave other parts blank.

Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

## 2 (b). New Contact details

**You may make this change online via MemberAccess.**

Residential Address



Town or Suburb

State

Postcode

Postal Address (if different to Residential Address above)



Town or Suburb

State

Postcode

Telephone Number

Mobile Number

Email



## 2 (c). New Occupation details

Judge  Barrister  Solicitor/Lawyer

Management staff  Administration/Support Staff

Other (please specify)

### 3. Investment options

You can change your investment options online via MemberAccess.

You can invest in one option or a mix of options. **The percentage for each option can only be up to 2 decimal places and the total must add up to 100%.** Please refer to 'How we invest your money' in legalsuper's *Superannuation Product Disclosure Statement (PDS)*.

Please leave my existing account balance as it is currently invested and invest all future contributions in accordance with the proportion (%) of each investment option that applies to my existing account balance. Yes  No

If "No":

- complete column 1 to change where your existing account balance is invested; or
- complete column 2 to change where future contributions will be invested; or
- complete columns 1 and 2 to change where your existing account balance and future contributions are invested.

Investment Option <sup>2</sup>	1 Please invest my existing account balance as follows:				2 Please invest all future contributions as follows: <sup>1</sup>			
	% for each Investment Option				% for each Investment Option			
MySuper Balanced <sup>3</sup> (Employer-sponsored members only)	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Enhanced Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced Index	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Overseas Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced Socially Responsible	<input type="text"/>	<input type="text"/>	<input type="text"/>	%	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
<b>Total</b>	<b>100</b>	<b>0</b>	<b>0</b>	<b>%</b>	<b>100</b>	<b>0</b>	<b>0</b>	<b>%</b>

1. If your existing account balance is invested in the Direct Investment Option (DIO) and you transfer funds from the DIO, your future contributions selection in column 2 will be applied to invest the amounts transferred from the DIO.

2. Applications for the DIO can only be made via MemberAccess at **legalsuper.com.au**. Investment in the DIO is subject to investment minimums. Please refer to the *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document.

3. For Employer-sponsored members, any amount that you have not provided any instruction for, will be invested in the default MySuper Balanced option.

We recommend that you seek appropriately qualified professional advice if you need assistance in making an investment choice.

### When an investment switch will occur

In the event that you elect to switch investment choices, your investment switch will occur using the next available unit price.

Requests to switch investment option(s) received before 4pm (AEST)\* on a National Business Day (i.e. a week day that is not a national public holiday or the NSW Queen's Birthday weekend or another day at the Trustee's discretion) will receive the unit price of that day.

Your account records will be updated two National Business Days after the request.

\* The 4pm (AEST) cut-off applies to requests received via all channels (e.g. online, forms).

The investment switch detail above does not include investments within the DIO, but does apply to transfers to and from the DIO.

### 4. Declaration

The personal information that you have provided on this form will be used by legalsuper to change your account in accordance with your instructions. If you do not complete the sections as detailed on page one, the Trustee will not be able to change the details as you have requested.

Information about how legalsuper uses and discloses the personal information that you provide is contained in the Fund's *Privacy Policy*. To access the Fund's *Privacy Policy* or your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday), visit legalsuper's website at **legalsuper.com.au** or write to legalsuper at Locked Bag 5081, Parramatta NSW 2124.

I acknowledge that:

- I have read the legalsuper *Superannuation Product Disclosure Statement (PDS)* and *Employer Sponsored Super & Personal Super Additional Information* document.
- legalsuper will implement any investment change instructions contained in the investment instructions detailed in Section 3.
- legalsuper is not responsible for my choice of investment strategy or my individual investment selections, or my decisions as to whether or when to sell my investments.
- legalsuper is not responsible for any delays in implementing my instructions.
- I understand that legalsuper will confirm my instructions in writing.

I acknowledge that I should seek independent professional financial advice if I need assistance.

Member's signature

Date (dd/mm/yyyy)

#### Please send the original of this form to:

legalsuper  
Locked Bag 5081  
Parramatta NSW 2124