

# Investment Switch Form

Acclaim Super & Pension



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.amgsuper.com.au](http://www.amgsuper.com.au).

**Please note:**

- FROM FUND total must equal TO FUND total
- Minimum initial investment of \$20,000 for the listed securities
- Minimum investment of \$5,000 for the term deposit options
- For the listed securities and term deposit options, to facilitate the payment of fees at least 5% of your account balance must be maintained in the DDH Graham Advantage Cash Fund, (refer to the relevant PDS and AIB for more information), subject to a requirement that a minimum balance of \$500 is maintained at all times.
- 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"/>				
Full name:	<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

**For Term Deposit investments please complete Section 4.**

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 %
TOTAL		TOTAL	

## Section 3: Switch instructions for future contributions

I request the Trustee of AMG Super to invest any future contributions as outlined in Section 2 of this form:  Yes  No

I request the Trustee of AMG Super to invest any future contributions as follows:

Investment Option	Percentage (%)
Total 100%	

## Section 4: Term deposit investment

For terms and rates available please contact AMG Super on 1300 264 264 or email [info@amgsuper.com.au](mailto:info@amgsuper.com.au).

Please note that as long as you have the available funds in cash you will receive the applicable interest rate on the day the application is received.^ The interest rate applied will be confirmed in your switch confirmation letter.

If selecting a term deposit option, please supply the following:

Amount to be invested:

\$

Term:

Option/s to redeem from:

Investment Option	Amount (\$)

^ If you are redeeming funds from a single manager option, to invest in a term deposit the Fund Manager may take up to a week to process the redemption. As a result there may be a delay in investing into the term deposit which may affect the rate you receive.

## Section 5: 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, nor any of the fund managers named in the PDS and AIB 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 investment fund PDS (including any Supplementary PDS) for any single manager investment option(s) I have selected or term deposit disclosure document for any term deposits I have selected, can be provided to me by the Trustee, Sponsor or my adviser via the website at [www.amgsuper.com.au](http://www.amgsuper.com.au) and I agree to receive any investment fund PDS by obtaining it from the website.
6. I have received (either via the website or from the Trustee, Administrator, Sponsor or my adviser), read and understood the investment fund PDS (including any supplementary PDS) for the single manager investment option(s) I have selected or term deposit disclosure document for any term deposits I have selected.
7. I acknowledge that if the Trustee continues to follow an instruction by me to invest my account in accordance with any single manager investment option selected by me, at the time of an additional acquisition of an interest in the underlying investment fund I may not have received:
  - a. the current investment fund PDS (including supplementary PDS) for the relevant underlying fund; or
  - b. information about materially adverse changes or materially adverse significant events that affect the information in the relevant investment fund PDS including changes or events affecting the investment fund's fees and costs, risks or other significant characteristics.
8. 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.
9. I acknowledge that my rights in relation to my investment in an single manager investment option are governed by the Constitution (amended from time to time) of the relevant underlying investment fund, and I agree to be bound by the terms and conditions of that Constitution.
10. The information I have provided in this form is true and correct.
11. 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 AMG Super PO Box 3528, Tingalpa DC Qld 4173 or email to [info@amgsuper.com.au](mailto:info@amgsuper.com.au)**

Phone: 1300 264 264 Fax: (07) 3899 7299 Website: [www.amgsuper.com.au](http://www.amgsuper.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 AMG Super's Privacy Statement, please let us know. We have published our Privacy Statement on our website at [www.amgsuper.com.au](http://www.amgsuper.com.au)