

Zurich Superannuation Plan

Alterations to existing investment

This form is only valid for alterations to existing investments, including increasing your contributions or changing your investment strategy. If you have any questions please do not hesitate to contact your adviser or Zurich's Customer Care team on 131 551.

IMPORTANT: Before making any decision regarding a change of investment strategy, we recommend that you seek professional financial advice. Please complete section 1, and:

- To increase existing regular investment or to make an additional investment, please complete section 2
- To switch existing investment options, please complete section 3
- To change investment options for future contributions only, please complete section 4

Note: All members must read and then sign section 5

Please use BLOCK Letter and where applicable.

OFFICE USE ONLY	
Account Number	<input type="text"/>
Client Number	<input type="text"/>

Adviser's stamp	Adviser	<input type="text"/>
	Adviser No.	<input type="text"/>
	Phone No.	<input type="text"/>



1 Member's details

Existing account number

Title	Surname	Given name(s)	
<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth	/	/
Residential address		State	Postcode
Postal address (if different to above)		State	Postcode
Contact details	Work	Home	
	Mobile	Email	

2 Increase / Additions to existing plan

Step 1. Please enter the amount you wish to increase your regular investment by, or the amount you wish to add to your existing plan.

Please note the fee option that currently applies to your Plan will be used for this increase / addition.

Lump sum (Entry Fee option and Nil Entry Fee option)	
Rollover (Superannuation Lump Sum Payment)	\$
Personal	\$
Employer (Superannuation Guarantee)	\$
Salary Sacrifice	\$
Employer (Award)	\$
Employer – Additional	\$
Self-employed	\$
Spouse contributions	\$
Insurance payout	\$
TOTAL	\$

Regular (Entry Fee option only)	
Personal	\$
Employer (Superannuation Guarantee)	\$
Salary Sacrifice	\$
Employer (Award)	\$
Employer – Additional	\$
Self-employed	\$
Spouse contributions	\$
TOTAL	\$

Please make cheques payable to Zurich Australia Limited. All cheques must be in Australian dollars and drawn on an Australian Bank.

2 Increase / Additions to existing plan (continued)

Step 2. Please indicate your investment selection for this increase / addition

(Please note, if you fail to indicate your preference below, all increases / additions will be made in the same proportions as your most recently advised investment strategy).

Invest in the same proportions as my most recently advised investment strategy, or

Invest as shown below.

Name of option	Code	APIR Code	Personal / Self Employed / Spouse investments	Employer investments	Rollover
Diversified options					
Capital Stable	3V	EF: ZUR0054AU NEF: ZUR0273AU	%	%	%
Balanced	RV	EF: ZUR0254AU NEF: ZUR0274AU	%	%	%
Managed Growth	5V	EF: ZUR0053AU NEF: ZUR0275AU	%	%	%
Priority Growth	7V	EF: ZUR0381AU NEF: ZUR0276AU	%	%	%
Managed Share	EV	EF: ZUR0050AU NEF: ZUR0277AU	%	%	%
Sector specific options					
Cash	CV	EF: ZUR0049AU NEF: ZUR0278AU	%	%	%
Australian Fixed Interest	XV	EF: ZUR0255AU NEF: ZUR0279AU	%	%	%
Australian Property Securities	PV	EF: ZUR0259AU NEF: ZUR0280AU	%	%	%
Australian Value Share	UV	EF: ZUR0256AU NEF: ZUR0281AU	%	%	%
Global Property Securities	4V	EF: ZUR0571AU NEF: ZUR0572AU	%	%	%
Global Thematic Share	IV	EF: ZUR0051AU NEF: ZUR0282AU	%	%	%
Global Growth Share	9V	EF: ZUR0608AU NEF: ZUR0613AU	%	%	%
Externally managed options					
First Sentier – Australian Share	AV	EF: ZUR0048AU NEF: ZUR0287AU	%	%	%
Total investments			100%	100%	100%

3 Switch investment options

I wish to switch my current investments in the Zurich Superannuation Plan as shown below. I understand that all future investments will be invested in this new strategy until such time as I notify you in writing to the contrary. (Please note that at any one time you can only have your money invested in a maximum of ten options.)

Please indicate the sub-account within which you wish to switch investment options. If you are switching monies in more than one but not all of your sub-accounts please photocopy this section, sign and date it and attach it to this Form.

Tick one box only

- All sub-accounts Self-employed contributions
 Personal contributions Roll-over (Superannuation Lump Sum Payment)
 Employer contributions Spouse Contribution

From			To		
Investment Option	Code (eg 3V)*	\$ Amount or % age	Investment Option	Code (eg 3V)*	\$ Amount or % age
Total			Total		

* For a complete list of codes, please refer to page 2 of this form.

4 Change investment option for future investments

I would like all future investments made to my Zurich Superannuation Plan to be invested into the following investment options in the nominated proportions. (Please note that at any one time you can only have your money invested in a maximum of ten options.)

Investment Option	Code (eg 3V)*	Personal / Self Employed / Spouse Investments	Employer investments	Rollover
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
		%	%	%
Total		100%	100%	100%

* For a complete list of codes, please refer to page 2 of this form.

5 Customer application and declaration

Please read and complete the following:

I hereby apply to Equity Trustees Superannuation Limited for the addition / alteration to my existing Zurich Superannuation Plan as set out in this form.

I acknowledge that this addition/alteration is governed by the terms of the current Zurich Superannuation Plan.

Member signature

Date

X

/ /

Privacy policy

Zurich and the Trustee are bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing Zurich and the Trustee with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. Please refer to the 'Trustee Privacy Statement' section in the "**Zurich Superannuation Plan and Zurich Account-Based Pension Fee Guide and Additional Information**" document located at www.zurich.com.au/zspandzabp.

A more detailed explanation of the Trustee's Privacy policy is available at www.eqt.com.au/global/privacystatement and can be obtained by contacting the EQT Group's Privacy Officer on (03) 8623 5000, or alternatively by contacting us via email at privacy@eqt.com.au. You should refer to the EQT Group Privacy policy for more detail about the personal information the EQT Group collects and how the EQT Group collects, uses and discloses your personal information.

For information about Zurich's Privacy Policy, a list of service providers and business partners that Zurich may disclose your Information to, a list of countries in which recipients of your Information are likely to be located, details of how you can access or correct the Information we hold about you or make a complaint, please refer to the Privacy link on the Zurich homepage – www.zurich.com.au, contact Zurich by telephone on 132 687 or email at privacy.officer@zurich.com.au

6 Adviser use only

This section need only be completed by your adviser when an additional investment has been made to your Zurich Superannuation Plan.

Adviser details

Please fill in the details for each adviser who has an interest in this application.

Name	Adviser No.	Phone No.	Fax No.	Commission Split%
1.				
2.				
				100%

Adviser declaration

I/we declare the information shown on the application accurately and completely records the information given.

Adviser 1 signature

Date

X

/ /

Adviser 2 signature

Date

X

/ /

Any questions? Call 131 551

Please send your completed form to:

The Trustee, Zurich Master Superannuation Fund, C/- Customer Care team, Locked Bag 994, North Sydney NSW 2059