



ZURICH[®]

Zurich Retirement Income Pension alteration form

You do not need to complete this form unless an alteration is to be made.



1 Member details

Investment Number _____

Title _____ Surname _____

Given Names _____

Residential address _____ State _____ Postcode _____

Contact details Work () Home ()

Mobile _____ Email _____

2 Frequency of payments

Monthly Quarterly Half-yearly Yearly

3 Payment Selection

Always minimum

Always maximum (Transition to retirement pension plans only)

Specific amount per frequency \$ _____

I understand that if my elected payment level falls below the required minimum, Zurich must increase the payment to the minimum level; or if my elected payment is greater than the maximum (where applicable), Zurich must decrease the payment to the maximum level.

Any questions? Call 131 551

Please send your completed application form to:

Zurich Australian Superannuation Pty Limited
Client Service Centre
Locked Bag 994
North Sydney NSW 2059

(no stamp required if posted in Australia)

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4 Change your investment strategy

Before making any decision regarding a change of investment strategy, we recommend that you seek professional financial advice and consider the information about the investment options in the last Annual Fund Report which is available free of charge on request, or can be accessed online at www.zurich.com.au.

Please note: As an alternative to making your own investment allocation decisions, you can elect for Zurich to make these decisions on your behalf. This option is called the **Automatic Investment Adjuster**. The Automatic Investment Adjuster changes the way your money is invested as you get older. It is designed to ensure that the risk level of your investments reduces over time. (This may mean that the rate of return you receive also reduces). **If you would like further details on the Automatic Investment Adjuster option, or wish to take up this investment option, please contact your financial adviser, or Zurich Customer Care on 131 551.**

Only complete the following table if you do not want to use the Automatic Investment Adjuster.

Please change my investment strategy to the following:

Please complete **BOTH** Column A and B. If you neglect to complete Column B, your pension payments will be drawn from the same investment mix as your money is invested.

Investment option	Where your money is invested	Where your pension payments are drawn from
	Your NEW investment allocation Column A	Your NEW payment Source Column B
Stable options		
Cash		
Australian Fixed Interest		
Capital Stable		
Balanced options		
Balanced		
Growth options		
Australian Property Securities		
Global Property Securities * #		
Zurich Investments Equity Income *		
Global Equity Income* #		
Managed Growth		
High Growth options		
Australian Value Shares		
Colonial First State Australian Shares * #		
Managed Share		
Global Thematic Share		
Global Growth Share* #		
Priority Growth		
Total	100%	100%

* Investment options marked with an asterisk (*) are not available for the Zurich Term Allocated Pension plan.

Investment options marked with a hash (#) are not available for the Nil Entry Fee option.

I understand that Zurich will make the necessary switches to reweight my investment portfolio in line with the above changes.

Signed

X

Date

/ /

5 Your privacy

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