



# PensionSelect

## SWITCH AND PENSION DRAWDOWN NOMINATION FORM

This form may be posted to:

AIA Australia  
Locked Bag 5075  
Parramatta NSW 2124

**Please note:** Changes will be made effective the date your completed documentation is received at our principal office of administration.

If you would like further information about this form, simply call our Customer Contact Centre on **13 2015** between 8.30am and 6pm (AEST/AEDT), Monday to Friday, excluding public holidays.

### Section 1 – Personal

PensionSelect Account number

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Postal address

  

State

Postcode

Daytime phone number

Evening phone number

Mobile phone number

Email address

### Section 2 – Switching investment options and/or changing your pension payment drawdown order

**Switching Investment options.** Please tick (✓) the appropriate box.

- Please switch my investment options and alter my pension payment drawdown order to match the same ratio as my investment mix at the time of payment. (Complete the 'switch from' and 'switch to' columns only.)
- Please switch my investment options and alter my pension payment drawdown order to what I specify overleaf marked with the numbers 1 to 9 in the payment order column. For example, payments will be made first from the option marked '1' until the funds in that option are exhausted, then from the option marked '2' and so on. (Complete all three columns.)

**Please note** If you do not specify the pension payment drawdown order, we will default the order to first pay pension payments from the most conservative investment option you are invested in. When that option is depleted, we will draw payments from the next most conservative investment option you are invested in, and so on.

If you have previously specified a pension payment drawdown order and do not want to change that order, you must enter that order in the payment order column again.

To fully switch out of any investment option(s), please place 100% or 'ALL' next to each investment option in the 'Switch from' column. If you nominate a percentage amount of less than 100%, we will only withdraw that percentage of the investment option, e.g. if you have \$20,000 in the investment option and specify 50%, we will withdraw \$10,000 from that investment option.

The total proceeds from your specified 'Switch from' investment option(s) will be used to buy the amounts indicated in the 'Switch to' column. Your 'Switch to' column must add up to 100% if using percentages, or to the exact amount specified in A if using dollar amounts.

#### Changing your pension payment drawdown order only

- Please change my pension payment drawdown order to match the same ratio as my investment mix at the time of payment. (Do not complete any of the columns.)
- Please change my pension payment drawdown order to what I specify overleaf marked with the numbers 1 to 9 in the payment order column. For example, payments will be made first from the option marked '1' until the funds in that option are exhausted, then from the option marked '2' and so on. (Complete the 'payment order number' column only.)

## Section 2 – Switching investment options and/or changing your pension payment drawdown order (continued)

		Investment option		Switch from	Switch to	Payment order number
<b>STRATEGY</b>	Aggressive	Multi-Manager Australian Share previously Australian Share	<b>AS</b>	\$/%	\$/%	
		Multi-Manager Global Share	<b>JP</b>	\$/%	\$/%	
	Growth	High Growth previously Growth	<b>AG</b>	\$/%	\$/%	
	Moderate	Growth previously Manged	<b>Q3</b>	\$/%	\$/%	
	Conservative	Balanced	<b>AB</b>	\$/%	\$/%	
		Capital Stable	<b>BU</b>	\$/%	\$/%	
	Defensive	Capital Defensive	<b>JE</b>	\$/%	\$/%	
		Capital Secure (only for members who joined before 1 July 2000)	<b>F3</b>	\$/%	\$/%	
		Savings	<b>U3</b>	\$/%	\$/%	
			<b>Total</b>		<b>(A) \$/%</b>	<b>(B) \$/%</b>
					<b>100%</b>	

## Section 3 – Declaration and acknowledgement

- I declare that the information provided on this form is correct.
- I request that your records be updated to reflect the changes indicated.

Member's signature

Date