



Personal Superannuation & Rollover Plan

SWITCH & CHANGE OF FUTURE INVESTMENT STRATEGY FORM

You may lodge this form by posting 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.

Section A – Personal (to be completed in all cases together with Section C).

Account number

Mr

Mrs

Miss

Ms

Other

Given name(s)

Surname

Postal address

State

Postcode

Daytime phone number

Evening phone number

Mobile number

Email address

Section B – Switching investment options and/or changing your future investment strategy

Switching investment options. Please tick (✓) the appropriate box.

I wish to switch my investment options.

Please complete both columns below headed 'Switch from' and 'Switch to'.

To fully switch out of an 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 the exact amount specified in A if using dollar amounts.

I wish to change where my future contributions are invested.

Please complete the right hand column below headed 'Future contributions'.

Investment option		Switch from	Switch to	Future contributions (%)
Australian Share	PS	\$/%	\$/%	
Growth	PG	\$/%	\$/%	
Managed	M3	\$/%	\$/%	
Balanced	PB	\$/%	\$/%	
Capital Secure	C3	\$/%	\$/%	
Savings	R3	\$/%	\$/%	
Total		(A) \$/%	(B) \$/%	
			100%	100%

Please note: Minimum switch amount of \$1,000 applies. Switches are effected at the applicable withdrawal and deposit price.

Section C – 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