



Office use only

Pension plan switching form.

October 2023

Complete this form to make an investment switch in your Hostplus Pension account. Switching is subject to the conditions outlined in our Pension Guide Product Disclosure Statement. It is strongly recommended you consult your financial adviser prior to making any decisions in relation to your investment in Hostplus Pension.

Please ensure that you complete all mandatory sections and fields marked with an asterisk (*) in dark blue or black ink. On completion, please return this form to the following address: **Locked Bag 5046, Parramatta NSW 2124.**

1 Provide your personal details.

Pension Plan membership number*

Title

 Mr Mrs Ms Dr Other

Given names*

Surname*

Date of birth*

Current address*

Suburb State P/C

2 Switch options.

Please complete either section A or B and tick the applicable section.

Section A

Complete the section below if you wish to switch a dollar amount from one Hostplus Pension investment option to another.

Example:

Switching **FROM** Hostplus option

Switching **TO** Hostplus option

Amount

\$, 1 0 , 0 0 0 . 0 0

Switch 1

Switching **FROM** Hostplus option

Switching **TO** Hostplus option

Amount

\$, , .

Switch 2

Switching **FROM** Hostplus option

Switching **TO** Hostplus option

Amount

\$, , .

Section B

Complete the following fields if you wish to alter the entire allocation within each investment option. You must have at least 1% in any selected option. The total percentage must add up to 100%.

Investment options	Percentage eg. 25%
Pre-mixed investment options	
Core options	
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Shares Plus	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Capital Stable	<input type="text"/> <input type="text"/> <input type="text"/> %
Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %
Indexed options	
Indexed High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Indexed Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Indexed Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Responsible Investment (SRI) options	
Socially Responsible Investment (SRI) – High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Responsible Investment (SRI) – Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Responsible Investment (SRI) – Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %
CPIplus (not available to TTR members)	<input type="text"/> <input type="text"/> <input type="text"/> %
Single sector investment options	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares (Hedged) – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares – Emerging Markets	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified Fixed Interest – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %
Total	1 0 0 %

3 Ongoing pension payment details.

Please indicate how you would like to draw down your pension payments. If you do not make any nomination below, payments will be drawn down Pro-rata ie. in proportion to your investment allocation.

Either

Proportional: Specify below the proportion to be withdrawn from each investment option.

Or

Priority order: Elect to have the pension payments withdrawn from each investment option in the order you specify below.

Or

Pro-rata

Investment options	Percentage eg. 25%	Priority order eg. 1, 2,3
Pre-mixed investment options		
Core options		
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Shares Plus	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Capital Stable	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Indexed options		
Indexed High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Indexed Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Indexed Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Socially Responsible Investment (SRI) options		
Socially Responsible Investment (SRI) – High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Socially Responsible Investment (SRI) – Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Socially Responsible Investment (SRI) – Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
CPIplus (not available to TTR members)	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Single sector investment options		
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Australian Shares – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
International Shares – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
International Shares (Hedged) – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
International Shares – Emerging Markets	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Diversified Fixed Interest – Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/>
Total	1 0 0 %	

Signature of applicant*



Date*



Faxed or scanned forms cannot be processed. However photocopied forms can be processed if signed with an original signature.

It is important that you answer all questions on this form. In confidence when completed.



When you have completed this form please send it to: **Hostplus, Locked Bag 5046, Parramatta NSW 2124**