

## Superannuation and Retirement Services



**Please note:**

- FROM FUND total must equal TO FUND total
- All investment switches will be arranged within 5 days from the date that Freedom of Choice receives your Investment Switch Form. The size and type of investment which you will be redeeming from and investing into, will determine how long it takes for your investment switch to be completed.

Membership Number:			
Surname:		Salutation:	
Given Name(s):		Date of Birth:	
Postal Address:			
Suburb:		State:	
		Postcode:	
Telephone (BH):		(AH):	
		Mobile:	
Email:			

**For Term Deposit investments please complete Section 4.**

I understand the following instructions will apply to the total balance of my account:

FROM FUND (Fund you want to REDEEM from)	Amount (\$) or %	TO FUND (Fund you want to INVEST to)*	Amount (\$) or %
TOTAL		TOTAL	

I request the Trustee of Freedom of Choice to invest any future contributions as outlined in Section 2 of this form:	Yes	No
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I request the Trustee of Freedom of Choice to invest any future contributions as follows:

Investment Option	Percentage (%)
	Total 100%

## Section 4: TERM DEPOSIT INVESTMENT

For terms and rates available please contact Freedom of Choice on 1800 806 013 or email [enquiries@freedomofchoice.com.au](mailto:enquiries@freedomofchoice.com.au).

Please note that as long as you have the available funds in cash you will receive the applicable interest rate on the day the application is received.^ The interest rate applied will be confirmed in your switch confirmation letter.

If selecting Term Deposit please supply the following:

Amount to be invested:

\$

Term:

Option/s to redeem from:

Investment Option	Amount (\$)

Would you like to reinvest for the same term at Maturity?

☐ Yes

☐ No

^ If you are redeeming funds from a managed fund to invest in a term deposit, the Fund Manager may take up to a week to process the redemption. As a result there may be a delay in investing into the term deposit may affect the rate you receive.

## Section 5: TARGET MARKET ASSESSMENT

The target market determination ('TMD') for Freedom of Choice products can be found at [freedomofchoice.com.au/target-market-determinations](https://freedomofchoice.com.au/target-market-determinations) and includes a description of who the product is appropriate for, based upon the characteristics of the product, and the likely investment objectives, financial situation and needs of the consumer that each product had been designed to meet.

**Products available through Freedom of Choice will also have their own TMD. A consumer must refer to the TMD and relevant disclosure documents when deciding if these products are suitable for them.**

**Please answer the following questions so that we can meet our regulatory obligations to take reasonable steps to ensure our products are distributed in line with those TMDs.**

Which of these investment goals best describes your primary investment objective?

☐ Capital growth ☐ Capital preservation ☐ Capital guaranteed ☐ Income distribution

Which of these statements best describes how long you expect to remain invested in this product and selected investment options?

☐ Short term (less than 2 years) ☐ Medium term (between 2 and 8 years) ☐ Long term (more than 8 years)

Which of these statements best describes your attitude to investment risk, ability to bear loss, and return?

- ☐ Low (Unwilling to see a reduction in value of investment even in the short term. Risk of loss is low as is corresponding return.)
- ☐ Medium (Unwilling to see a reduction in the value of investment in the medium term, willing to accept some risk in the short term compensated with a higher return.)
- ☐ High (Seeking a high return from investment over the long term, willing to see a reduction in short to medium term compensated with a higher return.)
- ☐ Very high (Seeking to maximise returns and are willing to accept periods of investment losses over the lifetime of your investment. You are willing to accept the risk that can derive from the use of aggressive investment strategies such as investment in alternative assets, derivatives or from the use of leverage.)

Which of these statements best describes how long you expect withdrawals to take from the product?

☐ Daily ☐ Weekly ☐ Monthly ☐ Quarterly ☐ Annually or longer

## Section 6: DECLARATION AND SIGNATURE

By signing this form, I confirm that:

1. I have been provided with a copy and have read and understood the relevant PDS and Reference Guide issued by Freedom of Choice including any conditions or limitations relating to investment in the Fund or its investment options
2. I have read, understood and agree to the handling of my personal information as outlined in the Privacy Statement in the Reference Guide.
3. I understand that my account can rise and fall, and that neither the Trustee, nor any of its directors, Acclaim Management Group Limited, nor any of its directors, nor any of the fund managers named in the PDS and Reference Guide guarantee the performance of the Fund or its investment options.
4. I acknowledge that past performance is not a guide to future performance.
5. I acknowledge that the Investment Fund PDS (including any Supplementary PDS) for any investment option/s I have selected or Term Deposit disclosure document for any Term Deposits I have selected, can be provided to me by the Trustee, Sponsor or my adviser via the website at [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au) and I agree to receive any Investment Fund PDS by obtaining it from the website.
6. I have received (either via the website or from the Trustee, Administrator, Sponsor or my adviser), read and understood the Investment Fund PDS (including any Supplementary PDS) for the investment option/s I have selected or Term Deposit disclosure document for any Term Deposits I have selected.
7. I acknowledge that if the Trustee continues to follow an instruction by me to invest my account in accordance with any investment option selected by me, at the time of an additional acquisition of an interest in the underlying investment fund I may not have received:
  - a. the current Investment Fund PDS (including Supplementary PDS) for the relevant underlying fund; or
  - b. information about materially adverse changes or materially adverse significant events that affect the information in the relevant Investment Fund PDS including changes or events affecting the investment fund's fees and costs, risks or other significant characteristics.
8. I acknowledge that the Trustee will invest my account in accordance with the selections made by me in this Investment Switch form (as varied by me from time to time) but that the Trustee reserves the right not to do so where necessary or appropriate without liability to any Member or prospective member.
9. I acknowledge that my rights in relation to my investment in an investment option are governed by the Constitution (amended from time to time) of the relevant underlying investment fund, and I agree to be bound by the terms and conditions of that Constitution.
10. The information I have provided in this form is true and correct.
11. I hereby direct the Trustee to invest my account balance in the investment options in the proportions indicated above, based on the declarations and acknowledgements made in this form.

Signature:

Date:

**Please return this completed form to Freedom of Choice PO Box 3528, Tingalpa DC Qld 4173 or email to [enquiries@freedomofchoice.com.au](mailto:enquiries@freedomofchoice.com.au)**

Phone: 1800 806 013 Fax: (07) 3899 7299 Website: [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au)

**We are committed to respecting the privacy of the personal information you give us.**

Our formal Privacy Statement sets out how we do this. If you would like a copy of the Freedom of Choice Privacy Statement, please let us know. We have published our Privacy Statement on our website [www.freedomofchoice.com.au](http://www.freedomofchoice.com.au)