



\*C00004-0023519114\*

# Switch and Investment strategy

You can update these details online. To do this login to [mlc.com.au](http://mlc.com.au)  
 Please don't photocopy this form as it contains unique information to help us process your request quickly.

## 1. Your personal details

Account number <input type="text"/>	Customer number (if known) <input type="text"/>	Contact telephone number (business hours) <input type="text"/>
Title Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	First name <input type="text"/>	
Middle name <input type="text"/>	Family name <input type="text"/>	
Date of birth (DD/MM/YYYY) <input type="text"/>	Email <input type="text"/>	

## 2. Your switch type

- Switch part of your investment  Complete **Section 3**
- Update your future investment and draw down strategy  Complete **Section 4**
- Switch your entire investment  Complete **Section 5**

**Please note:** If you hold MLC MasterKey Investment Protection there are implications when switching in to and out of your option with protection. Please refer to the **MLC MasterKey Super and Pension Fundamentals Product Disclosure Statement** or **How to Guide** for further details.

## 3. Switch part of your investment

Please use this section if you want to switch part of your existing investment to different investment options.

For full details of all investment options and who can invest in them please **see page 4**.

If you have more investment options, please attach a separate list.

Switch amount (\$ or %)	Switch from investment option Please write the full name of the investment option	Switch to investment option Please write the full name of the investment option

If you want to change your future additional investment and/or draw down strategy, please complete **Section 4**. Otherwise go to **Section 6** to authorise this transaction.

MLC Nominees Pty Limited  
 ABN 93 002 814 959  
 AFSL 230702 RSE L0002998

MLC Limited  
 ABN 90 000 000 402  
 AFSL 230694

The Universal Super Scheme  
 ABN 44 928 361 101  
 R1056778

## 4. Update your strategy for future additional investments or draw downs

Please use this section if you want to change your future investment strategy and/or draw down sequence for fees and refunds.

For full details of all investment options and who can invest in them, please see page 4.

If you have more investment options, please attach a separate list.

Draw downs aren't available for:

- MLC MasterKey Business Super and MLC MasterKey Personal Super
- NAB Term Deposits

Investment options Please write the full name of the investment option	Future investment strategy	Draw down <sup>1</sup> sequence for fees & refunds 1, 2, 3 etc
	%	
	%	
	%	
	%	
	%	
	%	
	%	
	%	
	%	
Percentage amounts must total 100%.	<b>Total</b>	%

<sup>1</sup> If no selection is made, deductions will be made on a pro-rata basis.

Please go to **Section 6** to authorise this change.

## 5. Switch your entire investment

Please use this section if you want to switch your total existing investment. If you want to update your strategy for future additional investments and draw downs, please complete the relevant column in the table below.

For full details of all investment options and who can invest in them, please see page 4.

If you have more investment options, please attach a separate list.

Draw downs aren't available for:

- MLC MasterKey Business Super and MLC MasterKey Personal Super
- NAB Term Deposits

How much you would like to invest in each option	Investment options Please write the full name of the investment option	Future investment strategy	Draw down <sup>1</sup> sequence for fees & refunds 1, 2, 3 etc
%		%	
%		%	
%		%	
%		%	
%		%	
%		%	
%		%	
%		%	
%		%	
%		%	
<b>Total</b>	%	Percentage amounts must total 100%.	<b>Total</b>
			%

<sup>1</sup> If no selection is made, deductions will be made on a pro-rata basis.

Please go to **Section 6** to authorise this change.

## 6. Your agreement and declaration

### I agree:

- if my completed request is received before 3 pm AEST/AEDT, it will usually be processed using the unit price for that business day (which is calculated at the end of the day)
- if my completed request is received after 3 pm AEST/AEDT, it will usually be treated as having been received the next business day
- where I have invested into an illiquid investment option or an investment option I have, has become illiquid, we may take longer than 30 days to transfer out of the investment option.

There are times when we might not be able to process your investment instructions, for example when:

- there are liquidity issues in the investment
- the fund manager suspends transactions
- we can't obtain a price
- the instruction is incomplete, and
- unforeseen circumstances prevent us from using our administration system.

Before making this change I have considered the information in the relevant **Product Disclosure Statement** and/or **Annual Report** about the investment options I have selected. I have also reviewed the information on the management of my account in the **How to Guide** or **Product Disclosure Statement**. (These documents are available on [mlc.com.au](http://mlc.com.au).)

### Signature of Investor or Attorney

Name

	Date (DD/MM/YY)				

### NAB Term Deposits

I understand NAB Term Deposits are invested for a fixed term. Early withdrawals are only permitted in extreme circumstances and will result in reduced interest.

Throughout the duration of my term deposits I agree to maintain a minimum of 10% of my super balance in other investment option(s) for fees and other costs plus a sufficient amount to cover one-off withdrawals. I also agree that one-off withdrawal requests that reduce the minimum of my other investment option(s) below 10% may not be processed.

### MasterKey Business Super and MasterKey Personal Super members

Making this investment switch or providing this instruction for the direction of contributions means:

- I do not want to have my super balance transferred to MLC MySuper automatically, and
- I understand the different administration fees that apply to investment options other than MLC MySuper.

### If signed by a duly Authorised Representative:

The Authorised Representative hereby certifies that he/she has not received notice of any limitation or revocation of his/her authority and is also authorised to sign this form.

**If signed under the Power of Attorney:** Attorneys must attach a certified copy of the Power of Attorney if not already supplied. The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be faxed.

## 7. Send us your form

Please mail or fax your completed, signed and dated form to:

**MLC**  
**PO Box 200**  
**North Sydney NSW 2059**  
**Fax number 02 9964 3334**

If you have any questions, please speak with your financial adviser, call us on **132 652** Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT) or visit [mlc.com.au](http://mlc.com.au)

# MLC MasterKey Super Fundamentals

## MLC MasterKey Super

### MLC MasterKey Business Super

### MLC MasterKey Personal Super

Investing with MLC	MLC MasterKey Super Fundamentals	MLC MasterKey Super	MLC MasterKey Business Super/ Personal Super
MLC MySuper	n/a	n/a	✓ <sup>2</sup>
MLC Horizon 1 – Bond Portfolio	✓	✓	✓
MLC Horizon 2 – Capital Stable Portfolio	✓	✓	✓
MLC Horizon 3 – Conservative Growth Portfolio	✓	✓	✓
MLC Horizon 4 – Balanced Portfolio	✓	✓	✓
MLC Horizon 5 – Growth Portfolio	✓	✓	✓
MLC Horizon 6 – Share Portfolio	✓	✓	✓
MLC Horizon 7 – Accelerated Growth Portfolio	✓	✓	✓
MLC Inflation Plus – Assertive Portfolio	✓	✓	✓
MLC Inflation Plus – Conservative Portfolio	✓	n/a	✓
MLC Inflation Plus – Moderate Portfolio	✓	n/a	✓
MLC Index Conservative Growth Portfolio	✓	n/a	✓
MLC Index Plus Balanced Portfolio	✓	n/a	✓
MLC Index Plus Growth Portfolio	✓	n/a	✓
MLC Cash Fund	✓	✓	✓
NAB Term Deposit – 6 Months	Rules apply <sup>1</sup>	n/a	n/a
NAB Term Deposit – 1 Year	Rules apply <sup>1</sup>	n/a	n/a
NAB Term Deposit – 2 Year	Rules apply <sup>1</sup>	n/a	n/a
MLC Diversified Debt Fund	✓	✓	✓
MLC Property Securities Fund	✓	✓	✓
MLC Global Property Fund	✓	✓	✓
MLC Global Share Fund	✓	✓	✓
MLC Hedged Global Share Fund	✓	✓	✓
MLC Australian Share Fund	✓	✓	✓
MLC Australian Share Value Style Fund	✓	✓	✓
MLC Australian Share Growth Style Fund	✓	✓	✓
MLC Global Share Value Style Fund	✓	✓	✓
MLC Global Share Growth Style Fund	✓	✓	✓
MLC IncomeBuilder	✓	✓	✓

<sup>1</sup> If you already have funds in a NAB Term Deposit, you can't switch additional money into that Term. The maximum amount which may be invested in NAB Term Deposits is 70% of your account balance. You can't invest in a NAB Term Deposit once you have attained the age of 90. A reminder notice will be sent to you prior to the maturity date. Please refer to the **How to Guide** on [mlc.com.au](http://mlc.com.au) for further information.

<sup>2</sup> Moving some or all of your current super balance to MLC MySuper may lead to your super becoming entirely invested in MLC MySuper in the future. This may result in:

- any fee waivers and maximum fee limits that may currently apply to you will not apply in future;
- changes to the services provided by your Plan adviser; and
- changes to your insurance premiums.

We recommend you consider speaking to your Plan adviser or calling us before making this investment switch.

**MLC MasterKey Super Fundamentals**  
**MLC MasterKey Super**  
**MLC MasterKey Business Super**  
**MLC MasterKey Personal Super**

Investing with MLC	MLC MasterKey Super Fundamentals	MLC MasterKey Super	MLC MasterKey Business Super/ Personal Super
Altrinsic Global Equities Trust	✓	n/a	✓
Antares Elite Opportunities Fund	✓	n/a	✓
Antares High Growth Shares Fund	✓	n/a	✓
Arnhem Australian Equity Fund	✓	✓	✓
Ausbil Australian Emerging Leaders Fund	✓	✓	✓
BlackRock Global Allocation Fund	✓	✓	n/a
Fairview Equity Partners Emerging Companies Fund	✓	n/a	✓
Investors Mutual Australian Share Fund	✓	✓	✓
MLC – Platinum Global Fund	Rules apply <sup>3</sup>	Rules apply <sup>3</sup>	Rules apply <sup>3</sup>
MLC – Vanguard Australian Share Index Fund	✓	✓	✓
Perennial Value Shares Wholesale Trust	✓	✓	✓
Perpetual Wholesale Australian Fund	✓	✓	✓
Perpetual Wholesale Ethical SRI Fund	✓	✓	✓
Perpetual Wholesale Smaller Companies Fund No. 2	✓	✓	✓
Platinum Asia Fund	✓	✓	✓
Platinum International Fund	✓	✓	✓
PM CAPITAL Absolute Performance Fund	✓	✓	✓
Schroder Wholesale Australian Equity Fund	✓	✓	✓
Vanguard® Australian Fixed Interest Index Fund	✓	✓	✓
Vanguard® Australian Property Securities Index Fund	✓	✓	✓
Vanguard® International Fixed Interest Index Fund (Hedged)	✓	✓	✓
Vanguard® International Shares Index Fund	✓	✓	✓
Vanguard® International Shares Index Fund (Hedged)	✓	✓	✓

<sup>3</sup> Available only to investors who already have a holding in this investment option. Once you have withdrawn all your investment balance from this option, it will no longer be available to you for future investments.

