

FirstChoice Employer Super Investment Selection Form (pre 11 June 2013 members)



SAVE FORM

PRINT FORM

Please phone Colonial First State Employer Services on 1300 654 666 with any enquiries.

Please complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate answer boxes with a cross like the following . Start at the left of each answer space and leave a gap between words.

OFFICE USE ONLY

Please note: You should only use this form if you joined the fund prior to 11 June 2013

1 INVESTOR DETAILS

Please give details of your FirstChoice Employer Super account number and/or details of your name.

FirstChoice Employer Super account number

Title
Mr Mrs Miss Ms Other

Full given name(s)

Surname

Date of birth Daytime contact number Mobile number Tax File Number

Postal address
Unit number Street number PO Box Street name
Suburb State Postcode
Country

Employer name

Email address

Why we ask for your email address and mobile number

- By providing your email, you are consenting to receive communications, including statements, e-IQ newsletters, promotions, significant event notices and other important information to your email address.
- By providing your mobile number, you are consenting to its use for security validations. This will allow you to access communications such as your statement via email.

You are able to change your contact preferences at any time by logging on to FirstNet or contacting us on 1300 654 666.

2 SWITCH DETAILS

If you have invested prior to June 2013 you can make the following switches

- Pre-11 June 2013 investment option to pre-11 June 2013 investment options (page 8)
- Pre-11 June 2013 investment option (page 8) to Lifestage and Select investment options (page 7)
- Lifestage and Select investment options to Lifestage and Select investment options (page 7)

Please note: you cannot switch from Lifestage and Select investment options to pre-11 June 2013 investment options Buy/sell spreads apply. See the current Product Disclosure Statement (PDS) for details.

Use this section if you are switching options that you were invested into prior to 11 June 2013 to other pre-11 June 2013 options (**Please note:** This option is only available to pre-11 June 2013 members). Refer to page 8 of this form for the option codes available.

Option CODE (refer to page 8 of this form)	FROM			Option CODE (refer to page 8 of this form)	TO		
	From dollar Amount	OR	From %		To dollar Amount	OR	To %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
TOTAL	\$ <input type="text"/>				\$ <input type="text"/>		100 %

Use this section if you are switching from pre-11 June 2013 options to the FirstChoice Lifestage or Select option menu. Refer to page 8 of this form for the pre-11 June 2013 option codes to switch from and page 7 of this form for the option codes available to switch to.

Option CODE (refer to page 8 of this form)	FROM			Option CODE (refer to page 7 of this form)	TO		
	From dollar Amount	OR	From %		To dollar Amount	OR	To %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %	<input type="text"/>	\$ <input type="text"/>		<input type="text"/> %
TOTAL	\$ <input type="text"/>				\$ <input type="text"/>		100 %

2 SWITCH DETAILS (CONTINUED)

Use this section if you are switching between FirstChoice Lifestage or Select options only. Refer to page 7 for the options codes available.

Option CODE (refer to page 7 of this form)	FROM		OR	From %	Option CODE (refer to page 7 of this form)	TO		OR	To %
	From dollar Amount					To dollar Amount			
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>		% <input type="text"/>
TOTAL	\$ <input type="text"/>					\$ <input type="text"/>			1 0 0 %

Please note: If you have specified a restricted, suspended or unavailable option, we may not be able to process your request immediately. You should refer to our website at colonialfirststate.com.au/fcesinv for important information on any changes to the availability of particular investment options.

3 INVESTMENT OF FUTURE DEPOSITS

Please indicate below how you would like your future investments allocated. If you do not tell us how you would like your future investments allocated, we will allocate as per the investment weightings in section 2. **Please note:** Additional deposits can only be made to the FirstChoice Lifestage and Select options (page 7).

Option CODE (refer to page 7 of this form)	%
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
TOTAL	1 0 0 %

4 REGULAR INVESTMENT PLAN (IF APPLICABLE)

Please indicate below how you would like your regular investment plan allocated. If you do not tell us how you would like your regular investment plan allocated, we will allocate as per your future investment selection. **Please note:** Regular Investment Plans can only be established with options from the FirstChoice Lifestage and Select option menu (page 7).

Option CODE (refer to page 7 of this form)	Regular investment plan amount
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
TOTAL	\$ <input type="text"/>

5 AUTO-REBALANCING

Please cross (X) the boxes below to indicate if you want your investment selection, as advised in **section 3** to be applied to auto-rebalance your account. If you make no frequency selection, we will rebalance your portfolio annually. Before taking up this facility, refer to the current PDS. **Please note:** This facility can only be established when the existing portfolio is invested 100% in options from the FirstChoice Lifestage and Select menu.

Establish auto-rebalancing facility Please complete the frequency for your account.

Frequency
Annually
Quarterly

Please note: This may result in an immediate switch transaction to bring your portfolio in line with your future investment selection.

6 ADVISER SERVICE FEE AND MONTHLY ADMINISTRATION FEE

Complete this section if you have agreed with your financial adviser to have an ongoing or one-off member level adviser service fee deducted and to indicate the option the monthly administration fee is to be deducted from. Note: the option selected for the ongoing adviser service fee (where applicable) will also be used for the monthly administration fee. Refer to the PDS for further details.

If no option or more than one option, an invalid option, or an option with an insufficient balance is nominated, we will deduct this fee in the order outlined on the back page of this form.

ONGOING FEE

Investment option from which the fee is to be deducted.
Indicate one option only

Ongoing adviser service fee

Select **ONE** option only

% of account balance % per annum

OR

\$ amount \$ per month

OR

Combination of above % per annum AND \$ per month

Cross (X) this box if you would like to increase your set dollar amount by a percentage based on CPI (or 3%, whichever is greater) each year.

ONE-OFF FEE

Investment options from which fee is to be deducted.
Indicate one option only

OR Deduct as per investment weighting at time of deduction.

One-off adviser service fee

\$

7 DECLARATION AND SIGNATURE

I declare that:

- I have access to the current PDS including all statements and information that are incorporated by reference and I have read or do not require such information
- all details in this form are true and correct
- if this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this application unless Colonial First State has already sighted it).

I confirm that the adviser service fee agreed with my adviser is:

- only for financial advice provided to me
- only for financial advice in relation to my investment in FirstChoice Employer Super, and
- I believe, a reasonable amount for the financial advice provided.

Original signature of member

Date signed

- If this application is signed under Power of Attorney, the Attorney declares that he/she has not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this application unless we have already sighted it).

If you are signing under a Power of Attorney, please comply with the following:

- attach a certified copy of the Power of Attorney document
- each page of the Power of Attorney document must be certified by a Justice of the Peace, Notary Public or Solicitor. Additional certification options are available from our 'Certification of documents – list of prescribed persons' form at colonialfirststate.com.au/prospects/FS4523.pdf.
- please also supply a certified copy of the identification documents for the Attorney, containing a sample of their signature, eg Drivers Licence, Passport, etc. The Attorney will also need to complete a power of attorney identification form (to enable us to establish the identity of the Attorney) which can be obtained from our forms library at colonialfirststate.com.au or by phoning Employer Services on 1300 654 666.

I acknowledge and agree that:

- my adviser will receive the payments as specified in this form via redemption of units from my investment and I consent to Colonial First State deducting and paying the amount of adviser service fee as specified in **section 6** of the form to my adviser through their dealer group
- where a dollar and percentage adviser service fee is elected, this election can be revoked within 30 days of the date of receipt of the request by Colonial First State. Any ongoing adviser service fee deducted during this period will be reimbursed to my account
- Colonial First State has the discretion to decline a request to pay this adviser service fee in order to comply with its obligations under superannuation law, and
- it may be an offence, including an illegal early release of super scheme, if the above confirmation is not true and correct.

Investments in FirstChoice Employer Super USI FSF0361AU (referred to as 'FirstChoice Employer Super', 'FirstChoice' or 'the fund') are offered from Colonial First State FirstChoice Superannuation Trust ABN 26 458 298 557 by Colonial First State Investments Limited ABN 98 002 348 352 AFS Licence 232468.

Print name

ADVISER USE ONLY

Adviser name

Contact number

Dealer ID

Adviser ID

Dealer/Adviser stamp (if applicable)

Additional comments

By providing your (adviser) details you confirm that the adviser service fee agreed with the member is:

- to your knowledge, not calculated on or by reference to any money borrowed after 1 July 2013, used or to be used by the member to invest in this product or any other financial product
- only for financial advice provided to the member
- only for financial advice in relation to the member's investment in FirstChoice Employer Super, and
- of a reasonable amount for the financial advice provided.

And you acknowledge that:

- Colonial First State has the discretion to decline a request to pay this adviser service fee in order to comply with its obligations under superannuation law, and
- it may be an offence including an illegal early release of super scheme if the above confirmation is not true and correct.

If the adviser service fee is a large percentage of the application proceeds or of an unusually high amount, please provide reasons:

Please send the completed form to:

Colonial First State

Reply Paid 27, Sydney NSW 2001

or via the secure online system (e-Post) with FirstNet Investor and FirstNet Adviser

FirstChoice Lifestage and Select Option Menu

Please use the following **CODES** under **section 3** of this form to indicate which investment option(s) you would like to switch between.

Please note: Where amounts are to be deducted from or credited to your investment, for example rebates or adviser service fees, and no option or an invalid option has been nominated by you, a default order exists. Generally, the default order draws from or credits to the more conservative option first, as determined by us. Please call Employer Services on 1300 654 666 should you require further information.

Option name	Code
DEFAULT INVESTMENT OPTION	
FirstChoice Lifestage 1945–49	980
FirstChoice Lifestage 1950–54	981
FirstChoice Lifestage 1955–59	982
FirstChoice Lifestage 1960–64	983
FirstChoice Lifestage 1965–69	984
FirstChoice Lifestage 1970–74	985
FirstChoice Lifestage 1975–79	986
FirstChoice Lifestage 1980–84	987
FirstChoice Lifestage 1985–89	988
FirstChoice Lifestage 1990–94	989
FirstChoice Lifestage 1995–99	990
FirstChoice Lifestage 2000–04	991
SELECT INVESTMENT OPTIONS	
MULTI-MANAGER MULTI-SECTOR	
FirstChoice Defensive Select	911
FirstChoice Conservative Select	912
FirstChoice Diversified Select	948
FirstChoice Moderate Select	913
FirstChoice Balanced Select	914
FirstChoice Growth Select	915
FirstChoice High Growth Select	916
MULTI-MANAGER SINGLE SECTOR	
FirstChoice Fixed Interest Select	917
FirstChoice Australian Share Select	919
FirstChoice Australian Small Companies Select ¹	920
FirstChoice Global Share Select	921
FirstChoice Property Securities Select ¹	918
FirstChoice Global Infrastructure Securities Select ¹	922
FIRSTCHOICE MULTI-INDEX SERIES	
FirstChoice Multi-Index Conservative Select	923
FirstChoice Multi-Index Diversified Select	925
FirstChoice Multi-Index Moderate Select	949
FirstChoice Multi-Index Balanced Select	924
FirstChoice Multi-Index Growth Select	951
FirstChoice Multi-Index High Growth Select	958
COLONIAL FIRST STATE INDEX SINGLE SERIES	
Colonial First State Index Australian Share Select	934
Colonial First State Index Property Securities Select	931

Option name	Code
OTHER OPTIONS	
Growth	
AZ Sestante Growth Select	954
Cash and Deposits	
FirstRate Saver Select	926
Short duration fixed interest	
Macquarie Income Opportunities Select	955
Diversified fixed interest	
Colonial First State Diversified Fixed Interest Select	928
UBS Diversified Fixed Income Select	929
Australian fixed interest	
Aberdeen Australian Fixed Income Select	927
Alternatives² – Suggested to be no more than 20% of your portfolio	
Aspect Diversified Futures Select	947
Australian share	
Ausbil Australian Active Equity Select	935
Bennelong ex-20 Australian Equities Select	950
Fidelity Australian Equities Select	933
Perennial Value Australian Share Select	937
Schroder Australian Equity Select	936
T. Rowe Price Australian Equity Select	938
Australian share – small companies² – Suggested to be no more than 50% of your portfolio	
OC Premium Small Companies Select	957
Global share	
Magellan Global Share Select	943
MFS Global Equity Select	940
Platinum International Select	939
Realindex Global Share Select	944
Realindex Global Share – Hedged Select	945
T. Rowe Price Global Equity Select	959
Global share – emerging markets² – Suggested to be no more than 50% of your portfolio	
Platinum Asia Select	942
Realindex Emerging Markets Select	941
Australian property securities² – Suggested to be no more than 50% of your portfolio	
Ironbark Property Securities Select	930
Global property and infrastructure securities² – Suggested to be no more than 50% of your portfolio	
Colonial First State Global Property Securities Select	932
Magellan Infrastructure Select	956
Geared² – Suggested to be no more than 30% of your portfolio	
Colonial First State Geared Share Select	946

1 The trustee suggests that no more than 50% of your portfolio is invested in these investment options. See the Investment Options Menu for more information on diversifying your portfolio.

2 The trustee suggests that your portfolio holds no more of its value in these investment categories than the maximum limit shown. See the Investment Options Menu for more information on diversifying your portfolio.

Investment Option Menu (for pre-11 June 2013 options)

Please use the following **CODES** under **section 3** of this form to indicate which investment option(s) you would like to switch between.

Please note: Where amounts are to be deducted from or credited to your investment, for example rebates or adviser service fees, and no option or an invalid option has been nominated by you, a default order exists. Generally, the default order draws from or credits to the more conservative option first, as determined by us. Please call Employer Services on 1300 654 666 should you require further information.

Option name	Code
MULTI-MANAGER MULTI-SECTOR	
FirstChoice Defensive	001
FirstChoice Conservative	013
FirstChoice Moderate	014
FirstChoice Balanced	251
FirstChoice Growth	015
FirstChoice High Growth	032
FirstChoice Geared Growth Plus ¹	240
MULTI-MANAGER SINGLE SECTOR	
FirstChoice Fixed Interest	012
FirstChoice Australian Share	016
FirstChoice Australian Small Companies ¹	071
FirstChoice Global Share	017
FirstChoice Asian Share	202
FirstChoice Property Securities ¹	018
FIRSTCHOICE MULTI-INDEX SERIES	
FirstChoice Multi-Index Conservative	005
FirstChoice Multi-Index Diversified	008
FirstChoice Multi-Index Balanced	022
COLONIAL FIRST STATE INDEX SINGLE SERIES	
Colonial First State Index Australian Share	028
Colonial First State Index Global Share	041
SINGLE MANAGER MULTI-SECTOR	
Colonial First State Conservative	004
Perpetual Conservative Growth	006
Moderate	
Colonial First State Balanced	007
Growth	
Colonial First State Diversified	021
Pendal Active Balanced	030
Perpetual Balanced Growth	031
SINGLE MANAGER SINGLE SECTOR	
Cash and Deposits	
Colonial First State Cash	011
FirstRate Saver	800

Option name	Code
Short duration fixed interest	
Colonial First State Global Credit Income	078
Diversified fixed interest	
Colonial First State Diversified Fixed Interest	002
Australian fixed interest	
Aberdeen Australian Fixed Income	003
Australian share	
Ausbil Australian Active Equity	036
Colonial First State Imputation	024
Fidelity Australian Equities	050
Pendal Australian Share	038
Perennial Value Australian Share	075
Perpetual Industrial Share	026
Schroder Australian Equity	039
Global share	
Generation Global Share ²	230
MFS Global Equity	063
Platinum International	066
Stewart Investors Worldwide Leaders	029
T. Rowe Price Global Equity	042
Global share – emerging markets³ – Suggested to be no more than 50% of your portfolio	
Platinum Asia	258
Specialist share³ – Suggested to be no more than 30% of your portfolio	
Janus Henderson Global Natural Resources	040
Australian property securities³ – Suggested to be no more than 50% of your portfolio	
Colonial First State Property Securities	065
Ironbark Property Securities	044
Global property securities³ – Suggested to be no more than 50% of your portfolio	
Colonial First State Global Property Securities	093
Geared³ – Suggested to be no more than 30% of your portfolio	
Acadian Geared Australian Equity	082
Colonial First State Geared Share	045

1 The trustee suggests that no more than 50% of your portfolio is invested in these investment options. See the Investment Options Menu for more information on diversifying your portfolio.

2 This option is only available to existing investors in this option.

3 The trustee suggests that your portfolio holds no more of its value in these investment categories than the maximum limit shown. See the Investment Options Menu for more information on diversifying your portfolio.