



Switch and Investment strategy

MLC MasterKey Superannuation
(Gold Star/Five Star)

You can update these details online. To do this login to 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	Customer number (if known)	Contact telephone (business hours)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	First name	
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>	<input type="text"/>	
Middle name	Family name	
<input type="text"/>	<input type="text"/>	
Date of birth (DD/MM/YYYY)	Email	
<input type="text"/>	<input type="text"/>	

2. Your switch type

- Switch part of your investment Complete Section 3
- Update your strategy for future additional investments Complete Section 4
- Switch your entire investment Complete Section 5

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](#).

A maximum of eleven investment options can be selected.

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, please complete **Section 4**.
Otherwise go to **Section 6** to authorise this transaction.

4. Update your strategy for future additional investments

Please use this section if you want to change your future investment strategy.

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

Investment options

Please write the full name of the investment option

Future investment strategy

			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
Percentage amounts must total 100%.			Total %

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

5. Switch your entire investment

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

Do you want to also update your investment strategy for future contributions?

No Please complete the first two columns in the table below

Yes Please complete all the columns in the table below

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

How much would you like to invest in each option?

Investment options

Please write the full name of the investment option

Future investment strategy for additional investment

			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
			%
Total	%	Percentage amounts must total 100%.	Total %

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 systems.

Before making this change I have considered the information in the relevant Product Disclosure Statement/or Annual Report about the investment options I have selected. (These documents are available on mlc.com.au)

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.

Signature of Investor or Attorney

	Date (DD/MM/YY)					

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 accepted by fax.

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 am and 6 pm (AEST/AEDT) or visit mlc.com.au

MLC Superannuation

MLC Core options	MLC MasterKey Superannuation (Gold Star)	MLC MasterKey Superannuation (Five Star)
Investment options		
MLC Horizon 1 – Bond Portfolio	✓	✓
MLC Horizon 2 – Capital Stable Growth 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 Australian Share Fund	✓	✓
MLC Australian Share Growth Style Fund	Rules apply ¹	n/a
MLC Australian Share Value Style Fund	Rules apply ¹	n/a
MLC Cash Fund	✓	✓
MLC Global Share Fund	✓	✓
MLC Global Share Growth Style Fund	Rules apply ¹	n/a
MLC Global Share Value Style Fund	Rules apply ¹	n/a
MLC IncomeBuilder	✓	✓
MLC Inflation Plus – Assertive Portfolio	✓	n/a
MLC Property Securities Fund	✓	✓
MLC – Platinum Global Fund	Rules apply ¹	Rules apply ¹
MLC Vanguard® Australian Share Index Fund	✓	✓
Arnhem Australian Equity Fund	Rules apply ²	n/a
Ausbil Australian Emerging Leaders Fund	✓	n/a
Investors Mutual Australian Share Fund	✓	n/a
Perennial Value Shares Wholesale Trust	Rules apply ²	n/a
Perpetual Wholesale Australian Share Fund	✓	n/a
Perpetual Wholesale Ethical SRI Fund	✓	n/a
Perpetual Wholesale Smaller Companies Fund No. 2	✓	n/a
Platinum International Fund	✓	n/a
PM CAPITAL Global Companies Fund	✓	n/a
Schroder Wholesale Australian Equity Fund	✓	n/a
Vanguard® Australian Fixed Interest Index Fund	✓	n/a
Vanguard® International Fixed Interest Index Fund (Hedged)	Rules apply ²	n/a
Vanguard® International Shares Index Fund (Hedged)	✓	n/a
Vanguard® International Shares Index Fund	✓	n/a
Vanguard® Property Securities Index Fund	✓	n/a
National Balanced Fund	Rules apply ¹	Rules apply ¹

¹ Only investors with a balance in this option may transact. Once you've withdrawn all your balance from this option, it will no longer be available to you.

² Available to those investors who already have a holding in this investment option however additional investments are no longer accepted. Once you have withdrawn all your investment balance from this option, it will no longer be available to you for future investments.