



Switch and Draw down strategy

MLC MasterKey Term Allocated Pension

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)

Title

Mr Mrs Miss Ms Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Email

2. Your switch type

Switch part of your investment Complete Section 3

Update your draw down strategy Complete Section 4

Switch your entire investment Complete Section 5

Please note: If you hold an investment in a Capital Protected investment option, you can't add to this option and there are implications when switching out of the option. A partial switch will reduce the capital protected value proportionally and a full switch will cancel the capital protection. You won't be able to restart your Capital Protection investment option after it's been cancelled.

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](#).

You can't have more than eleven investment options.

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

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

Please note: if you have previously given us a draw down sequence and your investment options have changed as a result of this switch, we will deduct your income payments and fees across your investment options, unless you tell us otherwise.

3. Switch part of your investment continued

Do you want to also update your draw down sequence for income payments and fees?

No Please go to Section 6 to authorise this transaction

Yes Please go to the Section 4

4. Update your draw down strategy

Please use this section if you want to change your draw down sequence for income payments and fees.

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

Investment options	Draw down ¹ sequence for fees 1,2,3 etc	Draw down ¹ sequence for income payments 1, 2, 3 etc
Please write the full name of the investment option		

¹ 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 to different investment options.
For full details of all investment options and who can invest in them, please see page 4.

You can't have more than eleven investment options.

How would you like to draw down your income payments and fees?

Select your own draw down sequence Please complete all the columns in the table below. You need to give a sequence number to all of your investment options.

Payments to be made on a pro-rata basis across your investment options Please complete the first two columns in the table below.

5. Switch your entire investment continued

How much would you like to invest in each option?	Investment options Please write the full name of the investment option	Draw down ¹ sequence for fees 1,2,3 etc	Draw down ¹ sequence for income payments 1, 2, 3 etc
%			
%			
%			
%			
%			
%			
%			
%			
%			
%			
%			
%			
%			
%			
Total	% Percentage amounts must total 100%.		

¹ 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 systems.

Before making this change I have considered the information in the relevant 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

X	Date (DD/MM/YY)								
	<table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> </table>								

If signed under the Power of Attorney: Attorneys must attach a certified copy of the Power of Attorney and identification for themselves (go to mlc.com.au to download the relevant identification form) 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

MLC MasterKey Term Allocated Pension investment options

MLC Portfolios	MLC MasterKey Term Allocated Pension
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 Cash Fund	✓
MLC Diversified Debt Fund	✓
MLC Global Share Fund	✓
MLC IncomeBuilder	✓
MLC Index Plus Balanced Portfolio	✓
MLC Index Plus Conservative Growth Portfolio	✓
MLC Index Plus Growth Portfolio	✓
MLC Inflation Plus – Assertive Portfolio	Rules apply ²
MLC Inflation Plus – Conservative Portfolio	✓
MLC Inflation Plus – Moderate Portfolio	✓
MLC Property Securities Fund	✓
MLC – Platinum Global Fund	Rules apply ¹
MLC – Vanguard® Australian Share Index Fund	✓
Ausbil Australian Emerging Leaders Fund	✓
Investors Mutual Australian Share Fund	✓
Perennial Value Shares Wholesale Trust	Rules apply ³
Perpetual Wholesale Australian Share Fund	✓
Perpetual Wholesale Ethical SRI Fund	✓
Perpetual Wholesale Smaller Companies Fund No. 2	✓
Platinum International Fund	✓
PM CAPITAL Global Companies Fund	✓
Schroder Wholesale Australian Equity Fund	✓
Vanguard® Australian Fixed Interest Index Fund	✓
Vanguard® International Fixed Interest Index Fund (Hedged)	Rules apply ^{1,3}
Vanguard® International Shares Index Fund (Hedged)	✓
Vanguard® International Shares Index Fund	✓
Vanguard® Property Securities Index Fund	✓

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

² You can invest up to 50% of your pension account in this Portfolio.

³ 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.