

1 Your details

Member number	Account number	Date of birth (DDMMYYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mr Mrs Ms Miss Dr	Last name	
<input type="text"/>	<input type="text"/>	
First name	Middle name/s	
<input type="text"/>	<input type="text"/>	
Residential address	<input type="text"/>	
Suburb/Town/City	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

2 Investment strategy

You can choose to invest in one or a combination of different investment options.

Current account balance

This changes how your **current account balance** is invested.

Future transactions

This changes how we invest new payments into your account and where withdrawals will come from. If you leave **future transactions** blank, we'll make it the same as your **current account balance** choice.

On 1 April 2021 we're merging with MTAA Super and we're keen to ensure you benefit from these changes. The merger is aimed at establishing a larger platform to strengthen our investment capabilities, deliver real scale benefits and provide a better, easier experience for all our members.

In preparation for the merger, we've carefully mapped all existing Tasplan members' investment strategy to the most comparable investment option in the new fund. Some options will be closing. To find out more see tasplan.com.au/investment-changes.

Investment option	Current account balance	Future transactions	
Growth			%
Sustainable			%
Balanced			%
Moderate			%
Conservative			%
Australian shares			%
International shares			%
Property ²			%
Fixed interest			%
Cash			%
Tasplan OnTrack ^{*1,2}			%
Total	100%		

¹ Your date of birth determines which Tasplan OnTrack stage you're invested in.

² This option will be closing on 1 April 2021.

*Registered to Tasplan Pty Ltd ABN 13 009 563 062.

3 Member declaration

By signing this form I'm making the following statements:

- I understand that Tasplan will generally update my investment strategy within three business days of receiving my completed request
- I've read and understood the guides available at tasplan.com.au/pds and I don't require any further information
- I consent to the use of my personal information as outlined in Tasplan's *Privacy policy* available at tasplan.com.au/privacy-policy
- I understand that if I run out of funds in the investment options I've selected for my **future transactions**, my withdrawals will be paid proportionately from my options in my **current account balance**.

Your signature

Date (DDMMYYYY)