



# IRIS Switch Form

## Step 1. Complete your Personal Details

Member Number:

Surname:

Given Name(s):

Daytime Contact Phone No:

## Step 2. Select your investment option(s)

Investment Option	Switch From % of investment option or \$ amount	Switch To % of investment option or \$ amount
IRIS Defensive Option		
IRIS Conservative Option		
IRIS Growth Option		
IRIS High Growth Option		
IRIS Cash Option		
IRIS Diversified Fixed Interest Option		
IRIS Property Option		
IRIS Australian Shares Option		
IRIS Sustainable Australian Shares Option		
IRIS International Shares Option		
<b>Total</b>		

**Note: The amount shown in the total field of the Switch From and Switch To columns should equal one another.**

*Please turn over to complete form*

### Step 3. Future income payment

Please indicate how you would like to draw down your income payments (optional, only complete if you wish to change how your income payments are drawn).

**You can:**

Specify the proportion to be withdrawn from each investment option or the order of investment options from which you draw your income payments (see below).

Investment Option	%	OR	Order (eg. 1,2,3)
IRIS Defensive Option			
IRIS Conservative Option			
IRIS Growth Option			
IRIS High Growth Option			
IRIS Cash Option			
IRIS Diversified Fixed Interest Option			
IRIS Property Option			
IRIS Australia Shares Option			
IRIS Sustainable Australia Shares Option			
IRIS International Shares Option			
<b>Total</b>	<b>100%</b>		

**OR**

Elect to withdraw the amounts in proportion to your investment allocations at the time of payment.

**If you do not make any nomination above, payment will be the same as your initial investment option.**

### Step 4. Confirm your instructions

- I declare that I am the IRIS member whose details appear on this form.
- I confirm that the details I have supplied are correct and request the Responsible Entity to process my request in accordance with the provisions of the Trust Deed.
- I have read the privacy information entitled 'Privacy' contained in the current IRIS Product Disclosure Statement relating to the financial product I have acquired, and I am aware that the Super Members Investments Privacy Policy is available from the IRIS website at retirewithiris.com.au.

**I hereby consent to the collection, use, storage and disclosure of my personal information as described in these documents. I understand that if I do not provide you with the information requested in this form, you may not be able to accept or carry out my requests or instructions.**

Signature:

Date:

### Step 6. Send this form to

**IRIS Administration  
Locked Bag 200  
Carlton South VIC 3053**

**Note:** Emailed request cannot be accepted. Faxed requests for amounts up to \$50,000 will be accepted and can be faxed to 1300 655 283, however the original signed form must be mailed to us. All other requests must be mailed to IRIS Administration. If you have any questions about completing the Switch Form, you can call us on **1300 367 485** between 8:30am and 5:30pm (Eastern Standard Time).

**Switching your money in IRIS may have tax implications. It is strongly recommended that you consult your financial planner prior to making any decisions in relation to your IRIS account.**

Super Members Investments Limited (SMI), ABN 61 095 974 100, AFSL 231230, is the Trustee of the IRIS Superannuation Fund, ABN 88 556 625 125, of which the IRIS Super Income Stream and IRIS Term Allocated Pension are divisions.

An Industry Fund Financial Planning (IFFP) planner is available by calling 1300 138 848. These "1300" numbers can be called from anywhere within Australia for the cost of a local call (mobile phones incur higher charges). IFFP and SMI are both owned by Industry Fund Services Pty Ltd ABN 54 007 016 195, AFSL 232514 and are related entities. For more information on IFFP, please visit [iffp.com.au](http://iffp.com.au).