

choosing to invest a lump sum

HESTA

This form enables you to invest lump sums in different investment option(s) from the rest of your HESTA account balance. Lump sums can be amounts such as a large contribution cheque or rollover from another fund. Please note that any instructions you provide to subsequently alter the investment option(s) of your account balance will override this lump-sum instruction.

How to invest a lump sum

Attach your cheque or rollover application request to the completed form and send it to HESTA or BPAY (log in to hesta.com.au/login to access your BPAY details). Before you make any decisions about your investment strategy, we recommend you read HESTA's *Investment choices* (available at hesta.com.au/pds or call 1800 813 327) and consider seeking professional financial advice.

Complete all parts of the form by typing in formation or if writing use capital letters. Check you have signed and dated the form.

1 Change your current HESTA account balance

Member number:

Title: Ms Mrs Miss Mr Dr Other

Given name/s:

Family name:

Postal address:

PO Box / Unit number / Street number

Street name/Suburb

State/Territory

Postcode

Date of birth:

Telephone number (home):

Mobile:

Email (optional):

BPAY amount

\$

Date paid

Reference number

2 Investment options

Investment options	Amount	% of total
Conservative	\$ <input type="text"/>	<input type="text"/> %
Balanced Growth (MySuper)	\$ <input type="text"/>	<input type="text"/> %
Indexed Balanced Growth	\$ <input type="text"/>	<input type="text"/> %
Sustainable Growth	\$ <input type="text"/>	<input type="text"/> %
High Growth	\$ <input type="text"/>	<input type="text"/> %
Cash and Term Deposits	\$ <input type="text"/>	<input type="text"/> %
Property and Infrastructure	\$ <input type="text"/>	<input type="text"/> %
Diversified Bonds	\$ <input type="text"/>	<input type="text"/> %
International Shares	\$ <input type="text"/>	<input type="text"/> %
Australian Shares	\$ <input type="text"/>	<input type="text"/> %
Total	\$ <input type="text"/>	<input type="text"/> %

(total must add up to 100%)

3 This instruction is to apply to these attached documents:

cheque amount \$

estimated rollover amount \$

from (name of super fund)

4 Declaration and acknowledgement

- I understand the investment option(s) I have chosen in this form apply only to the lump-sum amounts nominated in Section 3, and will apply only if the payments are received by HESTA within three months of HESTA receiving this form. I understand my other fund may not immediately rollover my benefit to HESTA. I acknowledge that if HESTA receives the rollover payment later than three months after receiving this form, it will be invested in the same way as my regular cashflow/contributions
- I understand the lump-sum amounts nominated in Section 3 will become part of my HESTA account balance and acknowledge that any instruction to subsequently alter the investment option(s) of my account balance (including previous instructions that will not take effect until a future date) will then override this instruction
- I acknowledge the Trustee of HESTA recommends that, before signing this form, I read and understand *Investment Choices* available at hesta.com.au/pds or call 1800 813 327
- I acknowledge HESTA has advised me to consider obtaining financial advice
- I understand that if I invest my lump sum in an investment option other than Balanced Growth, I am choosing to replace any interests I have in a MySuper Product with a Choice Product
- I understand past returns are not a reliable indicator of future returns
- I have read and understood HESTA's Privacy Collection Statement which is available at hesta.com.au/privacy or by calling 1800 813 327 and accept that the information on this form is true and correct to the best of my knowledge and belief. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.

Signature:

Date:

contact us

hesta@hesta.com.au | 1800 813 327 | Email forms to hesta@hesta.com.au or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

Issued by H.E.S.T. Australia Ltd ABN 66 006 818 695 AFSL No. 235249, Trustee of HESTA ABN 64 971 749 321. The information you provide on this form, and any subsequent information you provide to us or our service providers in relation to this form, is collected in accordance with the HESTA Privacy Collection Statement available at hesta.com.au/privacy or by calling 1800 813 327. Where you provide us with personal information about another person, it's your responsibility to notify that person about the disclosure of their personal information.