

## Changes to Standing Instructions/Switch Form

Use this form to request changes to your Standing Instructions or to switch between your Investment Pool and Guaranteed Cash. Please complete this form using **black ink** and print clearly within the boxes in **CAPITAL LETTERS**. Start at the left of each answer space and leave a gap between words. Please **CROSS X** appropriate answer boxes. Fields marked with an asterisk (\*) must be completed in order for us to action your request.

### \*I'd like to request:

Changes to my Standing Instructions       To switch my funds

### A. Member

My ClearView Superannuation and Roll-overs or Pension Plan account

My ClearView Rollover Bond account, or

My ClearView WealthFoundations Super or Pension account

\*My account number  /  (e.g. TSUP / 100000)

\*Title

Mr  Mrs  Ms  Miss  Dr  Other

\*Gender

Male  Female

\*Date of birth

\*Given name(s)

\*Surname

### B. Changes to Standing Instructions

#### Money In/Out Choice

Please change my:

**Money In Choice (super only) to:**     Investment Pool    OR     Guaranteed Cash

**Money Out Choice to:**                 Investment Pool    OR     Guaranteed Cash

**Note:** if your Money In or Money Out Choice is your Investment Pool then you must also provide Investment Pool Instructions below.

#### Investment Pool Instructions

To change the target mix of investment options within your Investment Pool please nominate below:

Investment Option	%
<b>Example: Prudent</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
<b>Total allocation</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %

### C. Switch funds between your Investment Pool and Guaranteed Cash

<input type="checkbox"/> Investment Pool to Guaranteed Cash	<input type="checkbox"/> Full switch (no need to enter a dollar amount below)
<input type="checkbox"/> Guaranteed Cash to Investment Pool	<input type="checkbox"/> Partial switch
<b>Total \$</b> <input type="text"/>	

### D. Declaration

By signing this request form, I am making the following statements:

- I declare that all the details given in this form are true and correct;
- I declare that, if signing under a power of attorney, I verify that, at the time of signing, I have not received a notice of revocation of that power.

We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy, please visit [www.clearview.com.au](http://www.clearview.com.au).

Signature of member

Date

Member/investor full name (print clearly in block letters)

## Sending your Form

Please send the form to us via email or mail.

Mailing address:

**ClearView Wealth**  
**Reply Paid 4232**  
**Sydney NSW 2001**

Email address:

**client.wealth@clearview.com.au**

If you have any questions or need help please call our Service Centre on **132 977**.