

ClearView Retirement Plan Application to Switch Units

This form is to be used for the ClearView Superannuation and Roll-overs and ClearView Pension Plan.

Account details

Account Number

Address

Postcode

Mr Mrs Miss Ms Other

Home phone number

Work phone number

() ()

Given name(s)

Surname

Switching details

The latest information about the investment options can be found in the current Product Disclosure Statement and investment newsletter. You should read this information before switching units. If you require a copy of the current Product Disclosure Statement or investment newsletter please call ClearView Retirement Solutions on 132 977.

A switching fee is currently not charged for the ClearView Superannuation and Roll-overs or ClearView Pension Plan.

The investment options you can switch into are;
 Guaranteed Cash, Conservative, Cautious, Prudent, Assertive, Aggressive

You cannot switch to Diversified Stable, Diversified Balanced, Diversified Growth, Australian Shares Growth, Managed, Managed Income or Managed Growth as these options are now closed to additional contributions or inward switches.

Please transfer:

Investment Option

Investment Option

<input type="text"/>	units or \$	<input type="text"/>	from	<input type="text"/>	to	<input type="text"/>
<input type="text"/>	units or \$	<input type="text"/>	from	<input type="text"/>	to	<input type="text"/>
<input type="text"/>	units or \$	<input type="text"/>	from	<input type="text"/>	to	<input type="text"/>
<input type="text"/>	units or \$	<input type="text"/>	from	<input type="text"/>	to	<input type="text"/>

No minimum switch applies

Switch option to commence as per above

Maintain current profile

Please Note: If your account balance is less than \$1,400 in the ClearView Superannuation and Roll-overs your account is 'Member Protected'. This means we invest your balance in the Guaranteed Cash option. If in the future your balance reaches \$1,500 or more, it will be switched to the investment option nominated by you above.

Payment options

- ClearView Pension Plan investors to complete

Following your switch, you may choose from which investment options you want your future pension payments to be paid. You may specify either the % from one or more investment options or the order of the investment options to be used, e.g Conservative 1st, Cautious 2nd, Assertive 3rd, etc. If you have not made a selection before, or if payment cannot be made on the basis of your last selection (if any), pension payments will be paid from the investment options in the order listed below under 'Default order of payment'.

Investment Option	Percentage	Order of payment ie. 1st, 2nd, 3rd	Default order of payment.
Guaranteed Cash	%	<input type="text"/>	1
Conservative	%	<input type="text"/>	2
Cautious	%	<input type="text"/>	3
Prudent	%	<input type="text"/>	4
Assertive	%	<input type="text"/>	5
Aggressive	%	<input type="text"/>	6

The following options are available only to those who invested prior to 1 February 2002.

Managed Income	%		7
Diversified Stable	%		8
Diversified Balanced	%		9
Managed Growth	%		10
Diversified Growth	%		11
Australian Shares Growth	%		12
	100%		

OR

Please make my pension payments on the basis of my last selection

Important: Where a withdrawal/rollover will affect a pension payment (ie. change which investment option pension is to be paid from), this form must be received by the 5th day of the month in which your next pension payment is due to be effective for that pension payment. Forms received after this date will not be guaranteed to be effective until the following pension payment due.

Privacy and your personal information

Collection, Use and Disclosure of your Personal Information

The Trustee and Administrator collect, use, and disclose your personal information in order to consider your application for the products in this brochure, to administer your account, and to pay any benefit or assess any claim made. You can choose not to provide us with some or all of your personal information, but this may affect our ability to do these things. Superannuation and taxation laws permit us, and in some cases require us, to collect this information.

By providing your personal information to us you acknowledge and declare that, and consent to the following:

1. we can collect and use your personal information for the following purposes: to assess your current and any subsequent application; administer your accounts; provide you with statements; calculate and offer benefits and discounts; underwrite, price and issue any insurance issued to you as part of your account; to investigate, assess and pay any benefit or claim made by or against you or your account; locate your lost superannuation money; and determine to whom your benefit will be paid to in the event of your death;
2. for these purposes we can collect your personal information from, and disclose it on a confidential basis to: our related entities; insurers; insurance reference bureaus; government departments and agencies; investigators; lawyers; advisers; medical and health service providers; employers; accountants; and the agent of any of these;
3. where you provide personal information to us about another person, you are authorised to provide that information to us, and that you will inform that person who we are, how we use and disclose their information, and that they can gain access to that information (unless doing so would pose a serious threat to the life or health of any individual).

Marketing Purposes

We are committed to providing you with access to a range of leading products and services.

In order to do this we will use your personal information to offer you other products and services. We may disclose your personal information on a confidential basis to our related entities within the ClearView Group of Companies so that they can also offer you products and services.

By providing your personal information to us you acknowledge that, and consent to:

- us collecting and using your personal information to contact you for market research and to provide you information and offers about products and services offered by us, our related entities and other organisations whose products and services we promote;
- us disclosing your personal information on a confidential basis for these marketing purposes to our related entities and to any agent of them; and
- you will inform us if you do not want your personal information to be used, or disclosed for these marketing purposes.

Please call 1800 265 744 if you have any questions, comments or concerns regarding privacy matters.

Our Privacy Policy

Further information on how we handle your personal information is explained in our Privacy and your personal information section including:

- How to contact us regarding Privacy;
- How to inform us to change your marketing consent; and
- How to access your personal information.

If you have any questions, comments or concerns regarding privacy matters or any other matter please call us on 1800 265 744.

Signature

I have read and consent to the collection, use and disclosure of my personal information as set out in the Privacy and your personal information section.

Signature
X
DATE / /

This form can be posted (no stamp required) to:

ClearView
Client Operations
Reply Paid 4232
Sydney NSW 2001

If you have any questions about this form,
please call us on

132 977