

Macquarie SuperOptions Additional investment form



Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281
Macquarie Superannuation Fund ABN 65 508 799 106 RSE R1004496

PLEASE USE BLACK INK

1. Client details

Account number (if known):

Given name(s)

Surname

Tax file number (if not already provided):

2. Investment type

Please confirm which investment type we are receiving by completing the relevant details in A, B or C below:

A) Contribution

Personal contribution

\$

Do you wish to lodge a notice of intent to claim a tax deduction for all/part of this contribution?

No

Yes.

Amount (covered by this notice) I will be claiming as a tax deduction \$

For the financial year ended 30 June 20

Employer contribution

\$

Spouse contribution

\$

Child contribution

\$

Other contribution

\$

Please specify the Other contribution type and attach appropriate documentation.

Please note:

We can not accept contributions made by you or someone on your behalf (other than your employer):

- if you have not provided your tax file number, or
- if the contribution is a non-concessional contribution that would exceed the level of the non-concessional contribution cap.

B) A rollover from another fund

Name of fund

Amount of rollover

\$

If you don't know the amount of rollover please leave blank.

Please ensure the necessary requirements of the other fund are met to have this rollover commenced.

C) Internal transfer of funds

Complete only if you are transferring these funds from another Macquarie investment.

Product name

Account number

How much are you transferring to the account listed in section 1?

partial amount of \$

the entire balance (please note that this constitutes a request to withdraw from the above account).

3. Investment options selection

Please select the investment(s) that you require from the menu of investment options listed below. If you do not allocate 100% of your investment, this may require clarification and delays in processing may be experienced. If required the unallocated portion will be invested into the **Macquarie Deposit Option**.

If you do not make a selection this investment will be allocated to the existing investment strategy.

Column A: Complete this column if you wish to allocate this investment and future investments by specifying a dollar amount for each investment option (this will be converted into a percentage).

Column B: Complete this column if you wish to allocate this investment and future investments by specifying percentages for each investment option.

Name	A Investment amount (\$)	B Investment allocation (%)
Conservative		
Blackrock Scientific Diversified Stable	\$ <input type="text"/>	<input type="text"/> %
Macquarie Capital Stable	\$ <input type="text"/>	<input type="text"/> %
UBS Defensive Investment*	\$ <input type="text"/>	<input type="text"/> %
van Eyk Blueprint Capital Stable	\$ <input type="text"/>	<input type="text"/> %
Balanced		
AMP Capital Balanced Growth Class A*	\$ <input type="text"/>	<input type="text"/> %
Blackrock Scientific Diversified Growth	\$ <input type="text"/>	<input type="text"/> %
Macquarie Balanced	\$ <input type="text"/>	<input type="text"/> %
Perpetual's Wholesale Balanced Growth	\$ <input type="text"/>	<input type="text"/> %
van Eyk Blueprint Balanced	\$ <input type="text"/>	<input type="text"/> %
Growth		
Colonial First State Wholesale Diversified*	\$ <input type="text"/>	<input type="text"/> %
ING Wholesale Managed Growth*	\$ <input type="text"/>	<input type="text"/> %
Macquarie Growth	\$ <input type="text"/>	<input type="text"/> %
van Eyk Blueprint High Growth	\$ <input type="text"/>	<input type="text"/> %
Cash		
Macquarie Deposit	\$ <input type="text"/>	<input type="text"/> %
Fixed interest		
Macquarie Australian Fixed Interest*	\$ <input type="text"/>	<input type="text"/> %
Macquarie Diversified Fixed Interest	\$ <input type="text"/>	<input type="text"/> %
UBS Australian Bond	\$ <input type="text"/>	<input type="text"/> %
Property securities		
Colonial First State Wholesale Property Securities	\$ <input type="text"/>	<input type="text"/> %
Australian shares		
Advance Imputation Wholesale	\$ <input type="text"/>	<input type="text"/> %
Custom Choice Boutique Australian Share	\$ <input type="text"/>	<input type="text"/> %
ING Wholesale Blue Chip Imputation*	\$ <input type="text"/>	<input type="text"/> %
Macquarie Australian Equities	\$ <input type="text"/>	<input type="text"/> %
Perpetual's Wholesale Industrial	\$ <input type="text"/>	<input type="text"/> %
Schroder Wholesale Australian Equity	\$ <input type="text"/>	<input type="text"/> %
UBS Australian Share*	\$ <input type="text"/>	<input type="text"/> %
van Eyk Blueprint Australian Shares	\$ <input type="text"/>	<input type="text"/> %
Macquarie Small Companies Growth	\$ <input type="text"/>	<input type="text"/> %

* These investment options are closed to new applications. If you have an existing holding you can make an additional investment by either specifying an investment amount in Question 3 Part A, or a percentage allocation in Question 3 Part B.

3. Investment options selection (continued)

Name	A Investment amount (\$)	B Investment allocation (%)
International shares		
Arrowstreet Global Equities	\$ <input type="text"/>	<input type="text"/> %
AXA Wholesale Global Equity Growth	\$ <input type="text"/>	<input type="text"/> %
Aberdeen International Shares	\$ <input type="text"/>	<input type="text"/> %
GMO Global Equity	\$ <input type="text"/>	<input type="text"/> %
Goldman Sachs JBWere International Wholesale*	\$ <input type="text"/>	<input type="text"/> %
van Eyk Blueprint International Shares	\$ <input type="text"/>	<input type="text"/> %
International shares – Specialist		
Platinum International	\$ <input type="text"/>	<input type="text"/> %
Geared shares		
Macquarie Geared Growth	\$ <input type="text"/>	<input type="text"/> %

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The Macquarie SuperOptions Product Disclosure Statement contains information about each of the investment options.

4. Clients aged between 65 and 74

If aged 65 – 74

I confirm that I have met the work test, by being gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year.

5. Confirmation and signature

I confirm that I have met the eligibility rules to contribute to superannuation (for information on these rules, refer to the *Are you eligible to invest?* section of the PDS).

If you are making a personal contribution for which you intend to claim a tax deduction by including a notice of intent to claim a tax deduction in Section 2A:

- I understand that if I choose to vary this notice, I cannot increase the amount I intend to claim as a tax deduction.

Signature (in black ink)

Name

Date

 / /

Title

 Mr Mrs Miss Ms Other

- Please make cheques payable to:
MLL SuperOptions [insert applicant's name], e.g. MLL SuperOptions John Citizen
- Send this form to:
Macquarie Investment Management Limited
GPO Box 1459
Brisbane QLD 4001 (please affix stamp)

If you have any questions about completing this form please call us on **1800 806 310**.