

# Your investment choice

Use this form to make an investment choice with HOSTPLUS Executive. Your choice will be effective on the first day of the month following processing of your complete and correct instructions. If your instructions are received within the last five working days of a month, they may not be processed by the month end deadline and will take effect on the first day of the next month.

Please complete the sections required in BLOCK letters and sign the form below. Once completed, please send your form to: HOSTPLUS Executive, Reply paid 83142, Carlton South VIC 3053.

For more information on the investment options available to you through HOSTPLUS Executive, visit [hostplusexecutive.com.au](http://hostplusexecutive.com.au) or call us on 1300 799 998 anytime between 8am–8pm, Monday to Friday.



## Step 1 Provide your personal details

<b>Membership number</b>	<b>Title</b>	<b>OFFICE USE ONLY</b>	
<input type="text"/>	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms	<input type="text"/>	
<b>Given name(s)</b>	<b>Surname</b>		
<input type="text"/>	<input type="text"/>		
<b>Address</b>			
<input type="text"/>			
<b>City/Suburb</b>	<b>State</b>	<b>Postcode</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Your business hours telephone number</b>	<b>Your after hours telephone number</b>	<b>Date of birth</b>	
<input type="text"/>	<input type="text"/>	D D / M M / Y Y	
<b>Your mobile number</b>	<input type="text"/>		
<b>Your email address</b>	<input type="text"/>		

## Step 2 Make an investment choice

Investment options	Your existing account balance	Future contributions made to your account (If left blank, your existing account balance mix will apply) <small>Minimum 1% in any selected option.</small>	Rollovers & one-off payments made to your account Amount: \$ _____ <small>Only complete this column if you are attaching a cheque or rollover form.</small>
<b>Pre-mixed</b>			
Capital Stable	%	%	%
Balanced	%	%	%
Conservative Balanced	%	%	%
Shares Plus	%	%	%
<b>Sector investments</b>			
Cash	%	%	%
Diversified fixed interest	%	%	%
Property	%	%	%
Australian shares	%	%	%
International shares	%	%	%
<b>Individual manager</b>			
Bridgewater – International Fixed Interest	%	%	%
Macquarie – Australian Fixed Interest	%	%	%
Industry Super Property Trust – Property	%	%	%
Lend Lease Managed Australian Prime Property Funds (Retail & Commercial) – Property	%	%	%
Balanced Equity – Australian Shares	%	%	%
Macquarie – Australian Shares	%	%	%
Paradise Investment Management (Small Cap) – Australian Shares	%	%	%
Perpetual – Australian Shares	%	%	%
AllianceBernstein – International Shares	%	%	%
Marvin & Palmer – International Shares	%	%	%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## Step 3 Sign the form

I acknowledge and understand that: 1. the trustee can provide information about investment choice but can't provide financial product advice to assist in making that choice, 2. the trustee is responsible for determining the investment objectives and strategies of each option and for selecting the investment managers, and 3. if the trustee removes an individual manager investment option I'm invested in and I don't select a new option, that invested amount will be transferred to the Balanced option. I have read and understood the investment options available as per the current HOSTPLUS Executive Member Product Disclosure Statement before nominating an investment option. I have received, read and understood the Privacy Statement on the current HOSTPLUS Executive Member Guide Product Disclosure Statement and consent to the collection, use, storage and disclosure of my personal information.

<b>Signature</b>	<b>Date</b>
<input type="text"/>	D D / M M / Y Y

# Investing with HOSTPLUS Executive



If you don't make an investment choice when you join HOSTPLUS Executive, your super is invested in the Balanced option – our default investment option. But everyone has different investment goals. That's why HOSTPLUS Executive offers 19 different investment options you can mix and match as you wish. Whether you make an investment choice or not, you already are an investor. Your super savings are invested by HOSTPLUS Executive, so it can grow in value over time. Why not take an interest in how your money is being invested?

## Why make an investment choice?

Each day we are offered a huge number of choices. What to eat for lunch? Where to park? Where to go for our next holiday? We base our decisions on how we feel, how much money we have available and the amount we want to spend. Can you imagine not having that sort of choice in your everyday life?

Making an investment choice is no different.

HOSTPLUS Executive recognises that you may want to take control and make a choice about your superannuation savings as well – after all, it's your money.

## Choose one option or more

Our 19 investment options are listed below and you can choose one or more to invest your super in. For example, you could have 50% invested in Shares Plus (a pre-mixed option), 25% in Property (a sector investment option) and 25% invested in Marvin & Palmer – International Shares (an individual manager option). The only requirement is that you must have at least 1% in any option you select.

### Pre-mixed options

The pre-mixed options are made up of different mixes of Australian shares, international shares, property, unlisted assets, diversified fixed interest and cash in proportions determined by HOSTPLUS Executive. Each pre-mixed option caters to investors with different investment styles or objectives. They include:

- Capital Stable
- Conservative Balanced
- Balanced (default)
- Shares Plus.

### Sector investment options

Our sector investment options allow you to focus on sector-specific asset types, such as:

- Cash
- Diversified Fixed Interest
- Property
- Australian Shares
- International Shares.

### Individual manager options

Going one step further, you can also decide to invest based on an individual investment manager for maximum control. The individual managers we offer are:

- Macquarie Investment Management – Australian Fixed Interest
- Bridgewater Associates – Diversified Fixed Interest
- Industry Super Property Trust Core Fund – Property
- Lend Lease managed Australian Prime Property Funds (Retail, Commercial & Industrial) – Property
- Balanced Equity Management – Australian Shares
- Macquarie Investment Management – Australian Shares
- Paradise Investment Management (Small Cap) – Australian Shares
- Perpetual Investment Management – Australian Shares
- AllianceBernstein – International Shares
- Marvin & Palmer Associates – International Shares.

## Making an investment choice

Before you make an investment choice, consider:

- your investment style and objectives
- your age and investment time frame
- your future financial plans
- your individual portfolio (including assets and investments outside superannuation) to minimise risks associated with investments not diversified in their own right.

To make an investment choice now, simply fill in the form on the back of this page and return it to HOSTPLUS Executive. Reply paid 83142, Carlton South VIC 3053.

For more information, visit [hostplusexecutive.com.au](http://hostplusexecutive.com.au) or call **1300 799 998**, 8am–8pm, Monday to Friday.