



ZURICH®

# Request for switch for ZRP (Upgraded Investment) Capital Guaranteed to Unit Linked



## 1 Personal details

Zurich Investment number

Title	Surname		
Given name(s)	Date of birth	/	/

**Note: Please attach evidence such as a copy of a marriage certificate to verify any name change.**

Residential address	State	Postcode
Postal address (if different to above)	State	Postcode

Are you an Australian resident for tax purposes? Yes  No

## 2 Switch request

I wish to switch my funds from the Zurich Capital Guaranteed option to a Zurich Unit Linked option(s). Specifically, I wish to switch my investment balance and future contributions to the following investment options

	Investment balance	Future contributions
Cash	%	%
Capital Stable	%	%
Balanced	%	%
Managed Growth	%	%
Managed Share	%	%
Global Thematic Share	%	%

## 3 Declaration

I understand that:

- My total current investment balance will be transferred to units at the next calculated unit price.
- The value of my units may rise and fall over time in line with movements in the value of the underlying assets and any investment performance guarantees in my plan will cease.
- Any portion of my investment balance that has a current Investment Management Fee (IMF) of 1% pa or less will incur a 1% pa IMF in the Unit Linked option(s).
- Any portion of my investment balance with a current IMF greater than 1% pa will incur the IMF applicable to the Unit Linked option(s) selected. In this case, the IMF will be as follows:
  - Cash option 1.30% pa
  - Global Thematic Share 1.75% pa
  - All other options 1.60% pa
- Further contributions or transfers of benefits to the Zurich Capital Guaranteed option will not be available.

Member / Investor's signature

Date

X

/ /

## 4 Your privacy

Zurich and the Trustee are bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing Zurich and the Trustee with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. Please refer to the 'Trustee Privacy Statement' section in the "**Zurich Superannuation Plan and Zurich Account-Based Pension Fee Guide and Additional Information**" document located at [www.zurich.com.au/zspandzabp](http://www.zurich.com.au/zspandzabp).

A more detailed explanation of the Trustee's Privacy policy is available at [www.eqt.com.au/global/privacystatement](http://www.eqt.com.au/global/privacystatement) and can be obtained by contacting the EQT Group's Privacy Officer on (03) 8623 5000, or alternatively by contacting us via email at [privacy@eqt.com.au](mailto:privacy@eqt.com.au). You should refer to the EQT Group Privacy policy for more detail about the personal information the EQT Group collects and how the EQT Group collects, uses and discloses your personal information.

For information about Zurich's Privacy Policy, a list of service providers and business partners that Zurich may disclose your Information to, a list of countries in which recipients of your Information are likely to be located, details of how you can access or correct the Information we hold about you or make a complaint, please refer to the Privacy link on the Zurich homepage – [www.zurich.com.au](http://www.zurich.com.au), contact Zurich by telephone on 132 687 or email at [privacy.officer@zurich.com.au](mailto:privacy.officer@zurich.com.au)