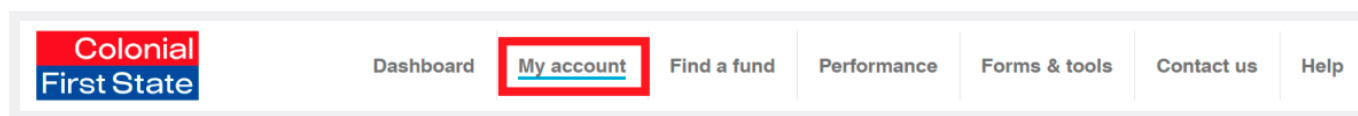


How to perform a switch via FirstNet

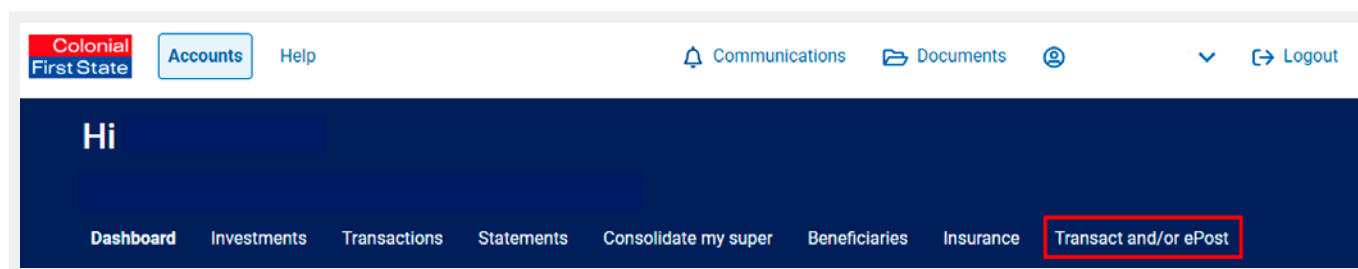
Step 1

There are two different displays you may see when logging in to your account:

- 1 If you see the below options, click on the 'My account' tab found at the top of the page.

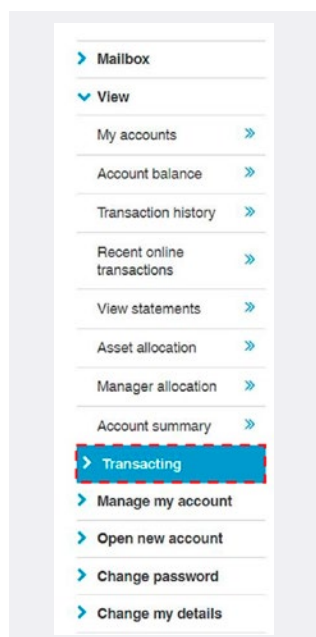


- 2 If you see the below options, click the 'Transact and/or ePost' tab found at the top of the page.



Step 2

On the left hand column select 'Transacting':



Step 3

Select 'Switch/change funds':

Transacting

- Additional investment >>
- Switch/change funds >>**
- Regular investment plan >>

Step 4

Fill in your switch details as per your preference.

- You can choose to switch by a dollar amount, percentage or change your entire investment allocation
- If you would like to invest in an investment option that does not appear under your current Investment options list, click on 'Select more options'.

Switch by dollars

Switch/change funds Account number: []

Enter the details of the switch Step 1 of 3

Need help completing your switch? [Find out more](#) what the types of switch and options below mean

Switch type

Switch by dollars
 Switch by percentage
 Change your investment allocation

Switch amount

Enter the switch 'From' and 'To' amounts in selected options from the list below:

Investment options	Risk rating	Minimum suggested timeframe	Option value (\$)	From	To
CFS WS Index: Balanced	High (6)	At least 5 years		1,000.00	
CFS WS Index: Growth	High (6)	At least 5 years			1,000.00
Total			\$		

Investment option values are as at 04/03/2022. They exclude any transactions requested since this date which are yet to be finalised, such as partial withdrawals, fees, additional investments, regular pension payments and switches.

[Select more options](#)

When switching by dollars, the 'To' column must equal the amount in the 'From' column.

Switch by percentage

Switch/change funds Account number:

Enter the details of the switch Step 1 of 3

Need help completing your switch? [Find out more](#) what the types of switch and options below mean

Switch type

Switch by dollars
 Switch by percentage
 Change your investment allocation

Switch amount

Enter the switch 'From' and 'To' amounts in selected options from the list below:

Investment options	Risk rating	Minimum suggested timeframe	Option value (\$)	From	To
CFS WS Index: Balanced	High (6)	At least 5 years		50.00	
CFS WS Index: Growth	High (6)	At least 5 years			100.00
Total			\$		

Investment option values are as at 04/03/2022. They exclude any transactions requested since this date which are yet to be finalised, such as partial withdrawals, fees, additional investments, regular pension payments and switches.

Select more options

When switching by percentage, the 'To' column must equal to 100%.

Example:
If you are switching 50% from Option A into Option B, you will need to enter '50' in the 'From' column and '100' in the 'To' column.

Change your investment allocation

Switch/change funds Account number:

Enter the details of the switch Step 1 of 3

Need help completing your switch? [Find out more](#) what the types of switch and options below mean

Switch type

Switch by dollars
 Switch by percentage
 Change your investment allocation

Switch amount

Enter your new investment allocation

Investment options	Risk rating	Minimum suggested timeframe	Option value (\$)	Current allocation (%)	New allocation (%)
CFS WS Index: Balanced	High (6)	At least 5 years		50.05	60.00
CFS WS Index: Growth	High (6)	At least 5 years		49.95	40.00
Total			\$	100.00%	100.00%

Investment option values are as at 04/03/2022. They exclude any transactions requested since this date which are yet to be finalised, such as partial withdrawals, fees, additional investments, regular pension payments and switches.

Select more options

When changing investment allocation, the 'New allocation' column must equal to 100%.

Step 5

Select 'Next' after:

- 1 Confirming if you want to change your future investment selection in line with your transaction:
 - a By ticking yes, all future deposits will reflect the new investment allocations you have just made, or
 - b By ticking no, the change will only apply to the current transaction, and all future deposits will remain as your original investment allocation instructions.
- 2 Ticking that you acknowledge the risk and return characteristics
- 3 Writing 'YES' to confirm you have read the PDS.

Future investment selection

Do you wish to change your future investment selection in line with your transaction? Yes No

Certain options are excluded from investment allocations. For further information please refer to the 'Other information you need to know' section of the [Product Disclosure Statement](#) available on our website, contact Investor Services on 13 13 36 or speak to your financial adviser.

Acknowledgment of the risk and return characteristics

I understand and accept the stated minimum investment timeframe, and risk measure category related to each of my selected investment allocations, as displayed in the table above.

For more information describing the risk and return characteristics of each individual investment option, and how this may apply to you, please refer to the investment option menu available from www.cfs.com.au

Confirm reading Product Disclosure Statement (PDS)

Please confirm that you have read and agree to be bound by the relevant product provider's terms and conditions and provisions (as amended) contained in the current [PDS](#) and the relevant Constitutions for the options that are selected or in which you are invested by typing YES.

Step 6

Ensure your switch details are entered correctly, then select 'Generate FirstNet Code':

Switch/change funds

Confirm the details of the switch Step 2 of 3

Switch between options in FirstChoice Wholesale Personal Super - requested by

Switch type

You elected to change your investment allocation.

Switch amount

You entered the amounts below:

Investment options	New option value (\$)*	New allocation (%)
Total		

* Estimated value only. The actual value of the switch will most likely differ from the value shown today as the switch will be processed using the unit price or accrued interest relevant at the time. You will receive final details of the transaction in a confirmation statement.

Future investment selection

The investment allocation shown below will be used for all future transactions unless you tell us otherwise.

Investment options	Current	To
Total		

Confirm reading Product Disclosure Statement (PDS)

You confirmed that you have read and agree to be bound by the relevant product provider's terms and conditions and provisions (as amended) contained in the current [PDS](#) and the relevant Constitutions for the options that are selected or in which you are invested by typing YES.

Important information

Investment selection: Changes made to your investment selection may affect future transactions including any regular investment from now on.

Value of switch: The estimated total value of this transaction as at is \$. The actual value of the switch will most likely differ from the value shown today as the switch will be processed using the unit price or accrued interest relevant at the time. You will receive final details of the transaction in a confirmation statement.

Tax implications: There may be [tax implications](#) of this transaction. You should consider seeking independent financial and taxation advice before changes are made to your investment.

For your security

You need to generate and enter a FirstNet Code to continue with this transaction.

Generate FirstNet Code

Enter your FirstNet Code

This transaction may have an impact on your long term financial strategy. Due to the nature of the investments and possible implications we strongly recommend you seek financial advice prior to completing this transaction.

Step 7

Enter the code that was generated to the FirstNet registered mobile.

Step 8

Check the box if you agree with the terms and conditions.

Step 9

Click 'Submit' to process the switch request.