

# Investment Strategy Form



Self Managed Superannuation

Complete this form in BLACK PEN and CAPITAL LETTERS and mark boxes with a [X].  
If you have any questions on how to complete this form contact SuperNation on 1300 884 509.

RETURN COMPLETED FORM TO: SuperNation Fund Administration Pty Ltd  
PO Box 5889, Gold Coast MC, Qld 9726

## 1. Fund Details

Fund name ("the Fund")

Fund account number

The trustee(s) of the Fund have determined that the minimum objective of the Fund will be to achieve positive growth in the fund's value over the life of the Fund. This objective is consistent with the purpose of the Fund to provide old age pensions to or in respect of members in the event of their retirement or for a members' dependents in the event of a death of a member. The suitability and performance of the fund's investments will be assessed by the trustee(s) at least once per year.

## 2. Asset Allocation

Please indicate below your Fund's preferred asset allocation strategy.

ASSET CLASS		ASSET RANGE	
CASH AND FIXED INTEREST	Cash	<input type="text"/> %	to <input type="text"/> %
	Australian fixed interest	<input type="text"/> %	to <input type="text"/> %
	Global fixed interest	<input type="text"/> %	to <input type="text"/> %
PROPERTY	Mortgages	<input type="text"/> %	to <input type="text"/> %
	Property	<input type="text"/> %	to <input type="text"/> %
SHARES	Australian shares	<input type="text"/> %	to <input type="text"/> %
	Global shares	<input type="text"/> %	to <input type="text"/> %
	Derivatives	<input type="text"/> %	to <input type="text"/> %
OTHER	Collectibles	<input type="text"/> %	to <input type="text"/> %
	Other	<input type="text"/> %	to <input type="text"/> %

### 3. Declaration and Signature

I/We declare that:

- all details in this form are true and correct;
- that I/we have resolved that the investment strategy as noted overleaf be accepted and applied from the date this form is received;
- in determining an investment strategy for the fund, I/we have taken into account all the fund's circumstances, including (but not limited to):
  - the risk involved in making, holding and realising fund investments and the likely return from these investments, having regard to the fund's objectives and cash flow requirements;
  - the composition of all the fund's investments, including the extent to which the investments are diverse or that they involve the fun in being exposed to risks from inadequate diversification;
  - the liquidity of the fund's investments, having regard to expected cash flow requirements;
  - the ability of the fund to meet its existing or future liabilities;
- if this form is signed under Power of Attorney, I/we have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless I/we have already sighted it);
- I/we release and indemnify SuperNation against any liabilities whatsoever arising out of SuperNation acting on any communications received by phone, fax, or other electronic means including without limitation transactions effected through the internet in respect of my/our investments.

**ALL TRUSTEES /DIRECTORS MUST SIGN**

**Print name of Trustee / Director 1**

  

Date

**Signature of Trustee/Director 1**

**Print name of Trustee/Director 2**

  

Date

**Signature of Trustee/Director 2**

**Print name of Trustee/Director 3**

  

Date

**Signature of Trustee/Director 3**

**Print name of Trustee/Director 4**

  

Date

**Signature of Trustee/Director 4**