

Mercer Super Trust – Individual Section of the Mercer SmartSuper Plan

Summary of Significant Events and Material Changes

Period: 1 February 2024 – 28 February 2026

The following is a summary of Significant Events and Material Change Notices that have been provided to members in the Individual Section of the Mercer SmartSuper Plan in the Corporate Superannuation Division of the Mercer Super Trust during the last two years. Copies of each Notice can be obtained by calling the Helpline on **1800 682 525**.

Notice Date	Nature of Event or Change	Impact of the change
February 2026	Transfer of super	- From 20 March 2026 current members of the Individual Section of the Mercer SmartSuper Plan will be transferred to Mercer Business super. - The transfer includes the following changes: - New Unique Superannuation Identifier (USI), new account number, new member number - Cost of insurance cover - Insurance terms and conditions - There will be a Limited Service Period from Wednesday 18 March 2026 until Tuesday 31 March 2026
June 2024	Fees and Cost Changes	The investment and transaction costs for the year ended 30 June 2023 have been finalised. Updated estimates for the year to 30 June 2024 have been provided for some investment options.
April 2024	Investment changes	- Effective 24 May 2024, some of the Mercer Sustainable Plus options will be closed. - For the Mercer Sustainable Plus options that remain open, there will be changes to: - Option names - Strategic Asset Allocation (SAA), SAA ranges and the Additional Exclusion Criteria - Standard Risk Measure

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