

Investment option form

Use this form: **To change your investment strategy for your KiwiSaver Account under SuperLife. Send the form to SuperLife Limited.**

Your details

IRD number - -

Name: _____

Date of birth: / / (dd/mm/yyyy) Phone: ()

Address: _____ Post code: _____

Email: _____

Investment strategy

I request that, as soon as possible, the investment strategy for my KiwiSaver Account under **SuperLife** is changed to the option indicated. Please tick one option to indicate your new investment strategy.

Information on each option is in SuperLife investment options.

Options

- Tick one box
- AIM^{Age Steps} *This is the standard investment option for members who do not choose their own.*
 - AIM³⁰
 - AIM⁶⁰
 - AIM⁸⁰
 - Managed³⁰
 - Managed⁶⁰
 - AIM^{First Home}
 - the D fund
 - Ethica
 - My Mix

If you tick "My Mix", you must also enter the percentage you want to put in each of the individual Pools

Cash	<input type="text"/> %
NZ bonds	<input type="text"/> %
OS Govt bonds	<input type="text"/> %
OS Non-govt bonds	<input type="text"/> %
Property	<input type="text"/> %
NZ shares	<input type="text"/> %
Australian shares	<input type="text"/> %
OS shares currency hedged	<input type="text"/> %
OS shares (unhedged)	<input type="text"/> %
Emerging markets	<input type="text"/> %
Gemino	<input type="text"/> %
Ethica	<input type="text"/> %
Managed ³⁰	<input type="text"/> %
Managed ⁶⁰	<input type="text"/> %
Total (Must be 100%):	<input type="text"/> %

Standard practice

The standard practice is that the new investment strategy will apply to both your current balance in your KiwiSaver Account and your future savings. Also, from time to time, your KiwiSaver Account will be rebalanced to maintain the overall strategy in line with your chosen investment strategy.

If you do **not** want the standard practice i.e. the rebalancing option to apply to your investment strategy, or you just want the new strategy to apply to your existing KiwiSaver Account balance, or your future contributions, tick as appropriate.

- My existing KiwiSaver Account balance**
If you only want to change the way the money in your existing KiwiSaver Account balance is invested, tick this box. Remember the automatic rebalancing option does **not** then apply.
- My future contributions**
If you only want to change how your future contributions are to be invested and leave your current investments unchanged, tick this box. Remember the automatic rebalancing option does **not** then apply.
- No auto rebalancing**
I do **not** want auto rebalancing to apply to my KiwiSaver Account. If you have chosen one of the options: AIM^{Age Steps}, Managed³⁰, Managed⁶⁰, AIM^{First Home} or the D fund, the auto-rebalance option must apply.

Signature

I understand that **SuperLife** will implement the above election as soon as is practical after it receives the form. When implemented, SuperLife will advise you that it has been done. Until you receive advice from SuperLife, do not assume it has been actioned.

Your signature: _____ Date: / / (dd/mm/yyyy)