

KiwiSaver Investment Option Election form

Use this form to **change your investment strategy** for your KiwiSaver Account.

Your details

IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>
First names	Surname		
Preferred name	Date of birth		
Email	Phone		
Address			
Town/City	Postcode		

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.

Options

- Please tick one box
- AIMAge Steps (This is the standard investment option for members who do not choose their own).
 - AIM30
 - AIM60
 - AIM80
 - Trustee30
 - Trustee60
 - AIMFirst 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

Information on each option is in SuperLife Investment options

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"/>	%
Overseas shares currency hedged	<input type="text"/>	%
Overseas shares (unhedged)	<input type="text"/>	%
Emerging markets	<input type="text"/>	%
Gemino	<input type="text"/>	%
Ethica	<input type="text"/>	%
Trustee30	<input type="text"/>	%
Trustee60	<input type="text"/>	%
Total (MUST TOTAL 100%)	<input type="text"/>	100%

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 the 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 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: AIMAge Steps, Trustee30, Trustee60, AIMFirst 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.

Your signature _____

Date / /

Send completed form to

TSB Bank KiwiSaver solution
c/o SuperLife Limited
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