

# Investment option form

Use this form: To change your investment strategy for your KiwiSaver Account under SuperLife. Send completed form to us at [superlife@superlife.co.nz](mailto:superlife@superlife.co.nz) or post to us at P.O. Box 105262, Auckland City 1143.

SLKS10 – 09.11.2016

## Your details

IRD number:    -    -

First names:  Surname:

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

Home address:  Post code:

Email:

## Investment strategy

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

### Investment strategy options

#### Standard risk/return options

- |                          |                                |   |
|--------------------------|--------------------------------|---|
| <input type="checkbox"/> | 1. Cash                        | Designed for the investor wanting their account invested in the safety of "cash".   |
| <input type="checkbox"/> | 2. SuperLife <sup>Income</sup> | } Designed for the investor wanting "conservative", "balanced" or "growth" style options. The number e.g. 60 represents the percentage in shares and property. The Income fund is the most conservative. See section 3 of the PDS for a full description. |
| <input type="checkbox"/> | 3. SuperLife <sup>30</sup>     |   |
| <input type="checkbox"/> | 4. SuperLife <sup>60</sup>     |   |
| <input type="checkbox"/> | 5. SuperLife <sup>80</sup>     |   |
| <input type="checkbox"/> | 6. SuperLife <sup>100</sup>    |   |

#### Targeted options

- |                          |                             |   |
|--------------------------|-----------------------------|---|
| <input type="checkbox"/> | 7. AIM <sup>Age Steps</sup> | SuperLife Age Steps automatically adjusts the proportion of your investment in income and growth assets depending on your age. As you get older, the proportion of your investment in higher risk growth assets will be reduced, lowering the expected size of the ups and downs in the value of your investment. |
|--------------------------|-----------------------------|---|

#### Ethical option

- |                          |           |   |
|--------------------------|-----------|---|
| <input type="checkbox"/> | 8. Ethica | Ethica is a "balanced" investment option that prohibits assets that do not meet ethical investment standards. |
|--------------------------|-----------|---|

#### Create your own strategy/portfolio

- |                          |           |  |
|--------------------------|-----------|--|
| <input type="checkbox"/> | 9. My Mix | If you tick "My Mix", you must also enter the percentage you want to put in each of the individual Funds in "My Mix strategy" over the page. |
|--------------------------|-----------|--|

Tick one box

## Standard investment practice

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

- I want the standard practice to apply.

If you do **not** want the standard practice (i.e. the rebalancing 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.

(tick all that apply)

- 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 of My Mix**  
 I do **not** want auto rebalancing to apply to my KiwiSaver Account of my chosen "My Mix" strategy.

### My Mix strategy

If you ticked investment option 8. "My Mix" you must complete this section, otherwise leave it blank.

		%
<b>Managed Funds</b>	SuperLife <sup>Income</sup>	<input type="text"/>
	SuperLife <sup>30</sup>	<input type="text"/>
	SuperLife <sup>60</sup>	<input type="text"/>
	SuperLife <sup>80</sup>	<input type="text"/>
	SuperLife <sup>100</sup>	<input type="text"/>
	Ethica	<input type="text"/>
<b>Sector Funds</b>	NZ Cash Fund	<input type="text"/>
	NZ Bonds Fund	<input type="text"/>
	Overseas Bonds Fund	<input type="text"/>
	Overseas Non-govt Bonds	<input type="text"/>
	Property	<input type="text"/>
	NZ Shares Fund	<input type="text"/>
	Australian Shares Fund	<input type="text"/>
	Overseas Shares (Currency)	<input type="text"/>
	Overseas Shares Fund	<input type="text"/>
	Emerging Markets Fund	<input type="text"/>
	UK Cash Fund	<input type="text"/>
	<b>ETF Funds</b>	NZ Cash ETF Fund
NZ Bond ETF Fund		<input type="text"/>
Global Bond ETF Fund		<input type="text"/>
NZ Dividend ETF Fund		<input type="text"/>
NZ Top 50 ETF Fund		<input type="text"/>
NZ Top 10 ETF Fund		<input type="text"/>
NZ Mid Cap ETF Fund		<input type="text"/>
NZ Property ETF Fund		<input type="text"/>
Australian Top 20 ETF Fund		<input type="text"/>
Australian Dividend ETF Fund		<input type="text"/>
Australian Financials ETF		<input type="text"/>
Australian Property ETF Fund		<input type="text"/>
Australian Resources ETF		<input type="text"/>
Australian Mid Cap ETF Fund		<input type="text"/>
Total World ETF Fund		<input type="text"/>
US S&P 500 ETF Fund		<input type="text"/>
Europe ETF Fund		<input type="text"/>
Asia Pacific ETF Fund		<input type="text"/>
US Growth ETF Fund		<input type="text"/>
US Value ETF Fund		<input type="text"/>
US Mid Cap ETF Fund		<input type="text"/>
US Small ETF Fund		<input type="text"/>
Emerging Markets ETF Fund		<input type="text"/>
<b>Total</b>	<i>(Must be 100%):</i>	<input type="text"/>

### Signature

I understand that **SuperLife** will implement the above request as soon as practicable after it receives this form.

When implemented, we will advise you that it has been done. Until you receive advice from us, do not assume it has been actioned.

**Your signature:** \_\_\_\_\_

**Date:**        /        /        *(dd/mm/yyyy)*