SUPERLIFE
a Member of the NZX Group

SuperLife KiwiSaver investment strategy change form

Use this form: To change your investment strategy for your SuperLife KiwiSaver account. Send the completed form to us at superlife@superlife.co.nz or post to us at P.O. Box 105262, Auckland City 1143. You can also change your investment strategy online at my.superlife.co.nz.

SLKS10 – 29.03.2019

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 SuperLife KiwiSaver account 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

Tick one box

Lifecycle investment option

☐ 1. SuperLife Age Steps

Designed for the investor wanting a strategy where the risk automatically reduces as they get closer to retirement.

Ethical fund

☐ 2. Ethica

Ethica is a "balanced" fund that prohibits assets that do not meet its ethical standards.

Diversified funds

☐ 3. SuperLife Income
☐ 4. SuperLife Conservative
☐ 5. SuperLife Balanced
☐ 6. SuperLife Growth
☐ 7. SuperLife High Growth

Designed for the investor wanting automatic allocation and rebalancing of their investment to the chosen risk profile.

Sector funds (create your own strategy/portfolio)

☐ 8. NZ Cash Fund

Designed for the investor wanting to invest in a "defensive" cash option that will earn only a small amount of interest per year.

☐ 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.

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 9. “My Mix” you must complete this section, otherwise leave it blank.

		%
Ethical fund	Ethica	
Diversified funds	SuperLife Income	
	SuperLife Conservative	
	SuperLife Balanced	
	SuperLife Growth	
	SuperLife High Growth	
Sector funds	NZ Cash Fund	
	NZ Cash ETF Fund	
	UK Cash Fund	
	NZ Bonds Fund	
	Overseas Bonds Fund	
	Overseas Non-govt Bonds Fund	
	NZ Property Fund	
	Australian Property Fund	
	Global Property Fund	
	NZ Shares Fund	
	NZ Top 50 Fund	
	NZ Top 10 Fund	
	NZ Dividend Fund	
	NZ Mid Cap Fund	
	Australian Shares Fund	
	Australian Top 20 Fund	
	Australian Dividend Fund	
	Australian Financials Fund	
	Australian Resources Fund	
	Australian Mid Cap Fund	
	Overseas Shares (Currency Hedged) Fund	
	Overseas Shares Fund	
	Asia Pacific Fund	
	Emerging Markets Fund	
	Europe Fund	
	Total World Fund	
	US 500 Fund	
	US Large Growth Fund	
	US Large Value Fund	
	US Mid Cap Fund	
	US Small Cap Fund	
Total	*(Must be 100%):*	

Signature

I understand that the Manager will implement the above request as soon as practicable after it receives this form and will advise me when it has been completed.

Your signature: ______________________ **Date:** / / *(dd/mm/yyyy)*