

## Change investment strategy

Use this form: To change your investment strategy for your existing and/or your future savings. It can be used for some or all of your SuperLife accounts. You can also change your strategy online at [my.superlife.co.nz](http://my.superlife.co.nz). Send the completed form to SuperLife at [superlife@superlife.co.nz](mailto:superlife@superlife.co.nz) or post to us at P.O. Box 105262, Auckland City 1143.

SL00031 – 30.07.2021

### Your details

SuperLife number	<input type="text"/>	or	IRD number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Name:	<input type="text"/>			Date of birth:	/	/	(dd/mm/yyyy)	
Email:	<input type="text"/>			Phone:	<input type="text"/>			
Home address:	<input type="text"/>					Post code:	<input type="text"/>	

### New investment strategy

I request, as soon as possible, that the investment options for my accounts are changed to the new option(s) indicated. I want the new options to apply to:

- (Tick either or both)
- ☐ **My existing account balances**  
If you want to change the way your existing account balances are invested, tick this box.
  - ☐ **My future contributions**  
If you want to change how your future savings/contributions will be invested, tick this box.

The standard practice is that your new investment strategy will apply to both your existing SuperLife account balances and your future contributions.

Choose one of the strategies (1 to 8) for each account. If you choose option 9, you also need to choose the Mix of the funds you want over the page.

Tick one option for each account that you wish to change and indicate the new investment strategy for that account. You must also sign the form over the page

See the Product Disclosure Statements for details on the options and the funds.

	Member	Employer	Voluntary	KiwiSaver	
<b>Lifecycle investment option</b>					
1 SuperLife Age Steps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Designed for the investor wanting a strategy where the risk automatically reduces as they get closer to retirement.
<b>Diversified funds</b>					
2 SuperLife Income Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Designed for the investor wanting automatic allocation and rebalancing of their investment to a chosen risk profile.
3 SuperLife Conservative Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4 SuperLife Balanced Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5 SuperLife Growth Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6 SuperLife High Growth Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Ethical fund</b>					
7 Ethica Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ethica is a "balanced" fund that prohibits assets that do not meet its ethical investment standards
<b>Cash</b>					
8 NZ Cash Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Sector funds</b>					
9 My Mix (next page)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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.

**Sector Funds** - If you ticked option 9 "My Mix" you must complete this section, otherwise leave it blank and just sign the form at the bottom.

		Member %	Employer %	Voluntary %	KiwiSaver %
<b>Diversified funds</b>	SuperLife Income Fund				
	SuperLife Conservative Fund				
	SuperLife Balanced Fund				
	SuperLife Growth Fund				
	SuperLife High Growth Fund				
<b>Ethical fund</b>	Ethical Fund				
<b>Guest manager fund</b>	Castle Point 5 Oceans Fund				
<b>Sector funds</b>					
<b>New Zealand shares</b>	S&P/NZX 50 Fund				
	NZ Shares Fund				
	NZ Top 50 Fund				
	NZ Top 10 Fund				
	NZ Mid Cap Fund				
	NZ Dividend Fund				
	NZ Property Fund				
<b>Australian shares</b>	S&P/ASX 200 Fund				
	Australian Shares Fund				
	Australian Top 20 Fund				
	Australian Mid Cap Fund				
	Australian Dividend Fund				
	Australian Financials Fund				
	Australian Resources Fund				
Australian Property Fund					
<b>US shares</b>	US 500 Fund				
	US Large Growth Fund				
	US Large Value Fund				
	US Mid Cap Fund				
	US Small Cap Fund				
<b>International shares</b>	Overseas Shares Fund				
	Overseas Shares (Currency Hedged) Fund				
	Total World Fund				
	Total World (NZ Hedged) Fund				
	Asia Pacific Fund				
	Emerging Markets Fund				
	Europe Fund				
	Global Property Fund				
<b>Bonds and cash</b>	NZ Bonds Fund				
	S&P/NZX NZ Government Bonds Fund				
	Overseas Bonds Fund				
	Overseas Non-government Bonds Fund				
	Global Aggregate Bond Fund				
	NZ Cash Fund				
	UK Cash Fund				
<b>Total</b>	(Must be 100%)				

#### Income

Each fund receives income (for example, interest and dividends) as part of its overall investment return. Our standard practice is to automatically reinvest the income into the fund it came from. However, another option is to invest the income into the NZ Cash Fund – this may be a better option for you, particularly if you are making regular withdrawals the Scheme.

Tick one income option:

- ☐ I want each fund's income reinvested into the fund it came from (standard practice).
- ☐ I want each fund's income reinvested into the NZ Cash Fund.

#### Rebalancing

Over time, market movements will change the proportions of your investments so that they differ from the proportions you set in your My Mix investment strategy. The following options let you choose whether we rebalance your investments (i.e. move money between your funds) to maintain these proportions.

Tick one rebalancing option:

- ☐ Option 1 – **Standard rebalancing**

Our standard practice is to regularly rebalance your investments (normally each month) to maintain the proportions you set in your My Mix investment strategy.

- ☐ Option 2 – **No rebalancing**

You can choose not to have your investments rebalanced. If you choose this option, the proportions of your investments will change with market movements.

- ☐ Option 3 – **Regular withdrawal rebalancing**

This option is designed for investors that want to:

- reduce the risk of withdrawing money from funds that invest in shares and property at a time when the value of those funds has fallen; and/or
- maintain a minimum level of cash and/or fixed interest.

If you choose this option, we will regularly rebalance your investments (normally each month) to maintain proportions set in your My Mix investment strategy; however, we will only rebalance by moving money from higher volatility funds (for example, funds that invest in shares and property) to lower volatility funds (for example, funds that invest in fixed interest and cash), and will not move money the other way. This may be a better option for you, particularly if you are making regular withdrawals from the Scheme.

#### Signature

I understand that SuperLife will implement the above strategy changes as soon as is practicable. Please note requests, once received by us, cannot be amended or cancelled.

Your signature:

Date: / / (dd/mm/yyyy)