

This form enables you to change the fund(s) you're invested in. Before completing this form you should refer to the current SuperLife Superannuation Master Trust product disclosure statement for information about what changes you can make to your investments, the various fund options and the fees that may apply. You can find the SuperLife Superannuation Master Trust product disclosure statement at superlife.co.nz/legal. Please complete this form together with the completed Identity and Address Verification form to superlife@superlife.co.nz or post to: SuperLife Superannuation Master Trust, PO Box 105262, Auckland 1143. For any questions, please call us on 0800 27 87 37 or +64 9 375 9800 if you're calling us from overseas.

SECTION 1: MEMBER DETAILS

Member number

Scheme name

Title (Mr, Mrs, Miss, Ms, Mx, Dr or Other)

Date of birth

D	D	M	M	Y	Y	Y	Y
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First names

Surname

Home phone

Work phone

Mobile

Email

Home address

SECTION 2: TAX DETAILS

Note: If you have already provided us with your IRD number and PIR, please ignore this section. If your PIR has changed, please tick the correct PIR. If you haven't given us your IRD number and PIR, we will apply a tax rate of 28% to any taxable income applicable to you for the relevant tax year.

IRD number

Prescribed Investor Rate (PIR) (Tick one)

10.5%

17.5%

28%

Refer to ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate to calculate your PIR.

SECTION 3: YOUR NEW FUND CHOICE

Please tell us what you would like to change. **CHOOSE ONE OPTION BELOW:**

I want to select **one** fund in which all of my SuperLife Superannuation Master Trust savings will be invested (existing savings and any future contributions).

PLEASE GO TO SECTION 3A

OR

I want to select **one** fund in which all my existing savings are invested and **another** fund for any future contributions.

PLEASE GO TO SECTION 3B

OR

I want to **split** my existing savings and any future contributions over more than one fund.

PLEASE GO TO SECTION 3C

SECTION 3A

Please select **one** fund below that both your existing savings and future contributions will be invested in.

SuperLife SMT Moderate Fund

SuperLife SMT Balanced Fund

SuperLife SMT Growth Fund

SuperLife SMT Cash Fund

SuperLife SMT NZ Fixed Interest Fund

SuperLife SMT World Fixed interest Fund

SuperLife SMT Australasian Shares Fund

SuperLife SMT World Shares Fund

SuperLife SMT Global Property Shares Fund

Once you've made your fund selection, please read the Privacy Authorisation in section 4 before signing the Authorisation in section 5.

SECTION 3B

Please tell us below the one fund you want your existing savings invested in and the other fund for your future contributions.

Which **one** fund do you want all of your **existing** savings invested in?

☐	SuperLife SMT Moderate Fund
☐	SuperLife SMT Balanced Fund
☐	SuperLife SMT Growth Fund
☐	SuperLife SMT Cash Fund
☐	SuperLife SMT NZ Fixed Interest Fund
☐	SuperLife SMT World Fixed Interest Fund
☐	SuperLife SMT Australasian Shares Fund
☐	SuperLife SMT World Shares Fund
☐	SuperLife SMT Global Property Shares Fund

☐ Tick if you wish to retain your current fund(s) selection for your existing savings

Which **one** fund do you want your **future** contributions invested in?

☐	SuperLife SMT Moderate Fund
☐	SuperLife SMT Balanced Fund
☐	SuperLife SMT Growth Fund
☐	SuperLife SMT Cash Fund
☐	SuperLife SMT NZ Fixed Interest Fund
☐	SuperLife SMT World Fixed Interest Fund
☐	SuperLife SMT Australasian Shares Fund
☐	SuperLife SMT World Shares Fund
☐	SuperLife SMT Global Property Shares Fund

Once you've made your fund selection, please read the Privacy Authorisation in Section 4 before signing the Authorisation in Section 5.

SECTION 3C

Please specify below how you want to split both your existing savings and future contributions.

Tick if you wish to retain your current fund(s) selection for your existing savings. Please only complete the future contributions column.

	Where do you want your existing savings invested?	Where do you want your future contributions invested?
SuperLife SMT Moderate Fund	%	%
SuperLife SMT Balanced Fund	%	%
SuperLife SMT Growth Fund	%	%
SuperLife SMT Cash Fund	%	%
SuperLife SMT NZ Fixed Interest Fund	%	%
SuperLife SMT World Fixed Interest	%	%
SuperLife SMT Australasian Shares	%	%
SuperLife SMT World Shares Fund	%	%
SuperLife SMT Global Property Shares	%	%
Total (must add up to 100%)	%	%

Note: If you are changing the funds for both your existing savings and future contributions, both columns must total 100%.

Once you've made your fund selection, please read the Privacy Authorisation in section 4 before signing the Authorisation in section 5.

SECTION 4: PRIVACY AUTHORISATION

The personal information you provide in this form, and any information you provide to us in the future, will be collected by Smartshares Limited (Smartshares), as Manager of the SuperLife Superannuation Master Trust, for purposes relating to the administration, operation, management and marketing of the scheme. Your personal information will be collected, used, stored and disclosed in accordance with the Privacy Act 2020 and SuperLife's Privacy Policy, which is available at superlife.co.nz/legal/privacy-policy.

You have the right to access and request correction to any personal information that you have supplied to Smartshares, by contacting superlife@superlife.co.nz. For further information about your privacy rights and the way Smartshares handles and stores your information see Smartshares Privacy Statement webpage at superlife.co.nz/legal/privacy-policy

SECTION 5: AUTHORISATION AND SIGNATURE

- I understand that the capital value of this investment can rise or fall depending on market conditions. I may therefore receive back less than I invested.
- I acknowledge that making a fund selection is my responsibility, and that neither the Manager nor the Supervisor is to be regarded as representing or implying that my fund selection is appropriate for my personal circumstances; and my fund selection will be a binding direction from me to the Manager.
- I understand that any change requested will be implemented by the Manager as soon as practicable after receipt of this completed form.
- I have received the current SuperLife Superannuation Master Trust product disclosure statement.
- I grant express consent for the Manager to disclose my information to its related companies.

Member's signature

Date

D	D	M	M	Y	Y	Y	Y
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To meet the requirements under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009, we must verify your identity and residential address. **If you have already provided us with this information, then you do not need to complete this section. If you are unsure, please call us to confirm. We have 2 options available, please select one of the options below:**

OPTION 1: ELECTRONIC IDENTITY AND ADDRESS VERIFICATION

Please tick the box below to give us your consent to electronically verify your details. You will receive a link from **noreply@cloudcheck.co.nz** on the device you are using to do this. Please follow the prompts to have your photo taken. The photo helps us verify the identity of the person presenting the documents.

☐ **I would like to verify my identity and address electronically. I authorise SuperLife to undertake this.**

You must have a valid NZ or Australian passport or driver's licence to complete electronic verification.

If we are unable to successfully identify you through electronic verification, you will need to provide us with the documents as per Option 2 (on the following page).

OPTION 2: CERTIFIED IDENTITY AND ADDRESS DOCUMENTS

If you select this option, you will need to provide SuperLife with certified copies of your ID documents and address proof as listed below. These documents must be posted to Freepost SuperLife, PO Box 105262, Auckland City, 1143.

A certified copy is a photocopy of an original document, on which an authorised person has written: *"I certify this to be a true copy of the original document"* or words to that effect (adding in the case of an identification document the words *"and that it represents the identity of [full name]"*); and – added their name and occupation, the date, their signature, their registration number (or equivalent) and their contact phone number.

The certifier cannot be someone who is related to you, is your spouse or partner, or lives at the same address. Certification must have been completed no more than 3 months prior to this application.

Your identity documents must be certified by one of the following (only if in NZ):

- Justice of the peace
- Registrar/Deputy Registrar
- Member of Parliament
- Registered teacher
- Notary Public
- Registrar
- Registered lawyer
- Police officer
- Registered doctor
- Kaumatua
- Chartered accountant
- Minister of Religion

Please contact us if you are having documents certified overseas so we can advise who can certify your documents. This list will differ from above.

Identification (please tick one option)

☐ **Option 1**
One document from this section

- | | |
|--|--|
| ☐ NZ Passport (identity page) | ☐ Overseas Passport (identity page) |
| ☐ NZ firearms licence | ☐ NZ certificate of identity |

☐ **Option 2**
NZ driver's licence PLUS one of the documents from this section

- | | |
|---|--|
| ☐ SuperGold card | ☐ NZ full birth certificate OR Birth certificate issued by foreign government |
| ☐ NZ citizenship certificate OR Citizenship certificate issues by foreign government | ☐ Bank statement or IRD letter issued in your name in the last 6 months |

☐ **Option 3**
Kiwi Access (formally 18+) Card PLUS one of the documents from this section

- | | |
|--|---|
| ☐ NZ full birth certificate OR Birth certificate issued by foreign government | ☐ NZ citizenship certificate OR Citizenship certificate issued by foreign government |
|--|---|

Address

Please supply a certified copy of one of the following as proof of address. The document you provide must be addressed to you showing the residential address you have declared in this application and be dated within the last 12 months:

- | | |
|--|---|
| ☐ Letter of invoice from utility company | ☐ Bank statement |
| ☐ Letter from government agency e.g., Inland Revenue, Waka Kotahi, rates bill, etc. | |