

# SuperLife contribution

Use this form: If you already belong to the SuperLife Invest scheme ("SuperLife") for savings. Send the completed form to us by email at [superlife@superlife.co.nz](mailto:superlife@superlife.co.nz) or post to us at PO Box 105262, Auckland City 1143.

SL00020 – 01.04.2019

## Your details

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

## Lump sum contribution

I wish to make a lump sum contribution to SuperLife of \$ \_\_\_\_\_

I attach a cheque payable to **SuperLife** for this amount.

or  I have made this payment directly into SuperLife's bank account on / / (dd/mm/yyyy)

Bank ASB  
 Branch Auckland North Wharf  
 Number 12 3244 0039562 00

Please use your SuperLife member number as the reference and put your surname in the payer code.

## Regular savings

I have attached a direct debit authority form and I want to contribute regular savings of:

\$ \_\_\_\_\_ each month  Date of each month:  (or the first business day thereafter).  
 or fortnightly  Start date for contributing:   
 or weekly  Day of week:

## Investment strategy

I want the lump sum to be invested as indicated.

As per my current strategy

As follows (tick one)

### Investment strategy options

#### Lifecycle investment option

1. SuperLife Age Steps

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 growth assets will be reduced, lowering the expected size of the ups and downs in the value of your investment.

#### Ethical fund

2. Ethica

A "balanced" fund that does not invest assets that do not meet its ethical investment 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 a chosen risk profile.

#### Sector funds (create your own strategy/portfolio)

- 8. NZ Cash Fund
- 9. My Mix (complete over page)

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

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.

<sup>1</sup> SuperLife refers to the SuperLife managed investment schemes: SuperLife KiwiSaver, SuperLife Workplace savings and SuperLife Invest. For more information, see the product disclosure statements (PDS) for the schemes, available at [www.superlife.co.nz](http://www.superlife.co.nz)

<sup>2</sup> Savings refers to your voluntary savings or individual account. Please specify further if you have more than one account

### My Mix strategy

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

		Lump sum \$ or %	Regular savings \$ or %
<b>Ethical fund</b>	Ethica	<input type="text"/>	<input type="text"/>
<b>Diversified funds</b>	SuperLife Income	<input type="text"/>	<input type="text"/>
	SuperLife Conservative	<input type="text"/>	<input type="text"/>
	SuperLife Balanced	<input type="text"/>	<input type="text"/>
	SuperLife Growth	<input type="text"/>	<input type="text"/>
	SuperLife High Growth	<input type="text"/>	<input type="text"/>
<b>Sector funds</b>	NZ Cash Fund	<input type="text"/>	<input type="text"/>
	NZ Cash ETF Fund	<input type="text"/>	<input type="text"/>
	UK Cash Fund	<input type="text"/>	<input type="text"/>
	NZ Bonds Fund	<input type="text"/>	<input type="text"/>
	Overseas Bonds Fund	<input type="text"/>	<input type="text"/>
	Overseas Non-govt Bonds Fund	<input type="text"/>	<input type="text"/>
	NZ Property Fund	<input type="text"/>	<input type="text"/>
	Australian Property Fund	<input type="text"/>	<input type="text"/>
	Global Property Fund	<input type="text"/>	<input type="text"/>
	NZ Shares Fund	<input type="text"/>	<input type="text"/>
	NZ Top 50 Fund	<input type="text"/>	<input type="text"/>
	NZ Top 10 Fund	<input type="text"/>	<input type="text"/>
	NZ Dividend Fund	<input type="text"/>	<input type="text"/>
	NZ Mid Cap Fund	<input type="text"/>	<input type="text"/>
	Australian Shares Fund	<input type="text"/>	<input type="text"/>
	Australian Top 20 Fund	<input type="text"/>	<input type="text"/>
	Australian Dividend Fund	<input type="text"/>	<input type="text"/>
	Australian Financials Fund	<input type="text"/>	<input type="text"/>
	Australian Resources Fund	<input type="text"/>	<input type="text"/>
	Australian Mid Cap Fund	<input type="text"/>	<input type="text"/>
	Overseas shares (Currency Hedged) Fund	<input type="text"/>	<input type="text"/>
	Overseas shares Fund	<input type="text"/>	<input type="text"/>
	Asia Pacific Fund	<input type="text"/>	<input type="text"/>
	Emerging Markets Fund	<input type="text"/>	<input type="text"/>
	Europe Fund	<input type="text"/>	<input type="text"/>
	Total World Fund	<input type="text"/>	<input type="text"/>
	US 500 Fund	<input type="text"/>	<input type="text"/>
	US Large Growth Fund	<input type="text"/>	<input type="text"/>
	US Large Value Fund	<input type="text"/>	<input type="text"/>
	US Mid Cap Fund	<input type="text"/>	<input type="text"/>
	US Small Cap Fund	<input type="text"/>	<input type="text"/>
<b>Total</b>		<input type="text"/>	<b>100%</b>

#### Auto rebalancing of My Mix

The standard practice is that your SuperLife Account balances will, from time to time, be rebalanced to maintain the overall strategy in line with your chosen investment strategy.

If you do **not want** to have the standard automatic rebalancing, tick the box below. Otherwise, leave it blank. If you have chosen an investment strategy other than "My Mix", automatic rebalancing always applies.

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

Note: The Total if entered as "\$" must equal the amount on page one. The Total if entered as "%" must equal 100%

### Signature

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

Date:     /     /     (dd/mm/yyyy)