

## Investment switches

Use this form: To switch some or all of your existing savings between different investment funds.

If you want to also change your strategy for your future contributions do not use this form. You should complete a "Change Investment Strategy" form.

This form applies to members where SuperLife does not automatically rebalance their account balance for their chosen investment strategy. If SuperLife does automatically rebalance your account balance, you must use a "Change Investment Strategy" form.

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 1143.

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### Your details

SuperLife number:

IRD number:    -    -

Name:

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

Email:

Phone: ( )

Home address:

Post code:

### Investment switches


In respect of my existing savings, I wish to switch money between the funds as identified on page 2.

I want the switch on page 2 to be applied to:

each of my accounts or  just my \_\_\_\_\_ account (enter name of account eg. "Member", "Employer", "Voluntary", "KiwiSaver").

<b>To be moved:</b>		<b>From*</b>	<b>To</b>
<b>Fund</b>		<i>(enter \$ amount or the percentage of your existing balance in that Fund)</i>	<i>(enter \$ amount or percentage of total amount to be switched)</i>
<b>Diversified funds</b>	SuperLife Income Fund	<input type="text"/>	<input type="text"/>
	SuperLife Conservative Fund	<input type="text"/>	<input type="text"/>
	SuperLife Balanced Fund	<input type="text"/>	<input type="text"/>
	SuperLife Growth Fund	<input type="text"/>	<input type="text"/>
	SuperLife High Growth Fund	<input type="text"/>	<input type="text"/>
<b>Ethical fund</b>	Ethica Fund	<input type="text"/>	<input type="text"/>
<b>Guest Manager fund</b>	Castle Point 5 Oceans Fund	<input type="text"/>	<input type="text"/>
<b>Sector funds</b>			
	<b>- New Zealand shares</b>	S&P/NZX 50 Fund	<input type="text"/>
		NZ Shares Fund	<input type="text"/>
		NZ Top 50 Fund	<input type="text"/>
		NZ Top 10 Fund	<input type="text"/>
		NZ Mid Cap Fund	<input type="text"/>
		NZ Dividend Fund	<input type="text"/>
<b>- Australian shares</b>		NZ Property Fund	<input type="text"/>
		S&P/ASX 200 Fund	<input type="text"/>
		Australian Shares Fund	<input type="text"/>
		Australian Top 20 Fund	<input type="text"/>
		Australian Mid Cap Fund	<input type="text"/>
		Australian Dividend Fund	<input type="text"/>
		Australian Financials Fund	<input type="text"/>
<b>- US shares</b>		Australian Resources Fund	<input type="text"/>
		Australian Property Fund	<input type="text"/>
		US 500 Fund	<input type="text"/>
		US Large Growth Fund	<input type="text"/>
		US Large Value Fund	<input type="text"/>
<b>- International shares</b>		US Mid Cap Fund	<input type="text"/>
		US Small Cap Fund	<input type="text"/>
		Overseas Shares Fund	<input type="text"/>
		Overseas Shares (Currency Hedged) Fund	<input type="text"/>
		Total World Fund	<input type="text"/>
		Total World (NZD Hedged) Fund	<input type="text"/>
		Asia Pacific Fund	<input type="text"/>
<b>- Bonds and cash</b>		Europe Fund	<input type="text"/>
		Emerging Markets Fund	<input type="text"/>
		Global Property Fund	<input type="text"/>
		NZ Bonds Fund	<input type="text"/>
		S&P/NZX NZ Government Bond Fund	<input type="text"/>
		Overseas Bonds Fund	<input type="text"/>
		Overseas Non-government Bonds Fund	<input type="text"/>
		Global Aggregate Bond Fund	<input type="text"/>
	NZ Cash Fund	<input type="text"/>	
	UK Cash Fund	<input type="text"/>	
<b>Total</b>		<input type="text"/>	<input type="text"/>

If you currently have SuperLife Age Steps and wish to change your strategy, you need to use the "Change Investment Strategy" form.



\*All other money in my funds should stay as it is.

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)