

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 to 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 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").



To be moved:		From*	To
Fund		<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>
Managed Funds	SuperLife ^{Income}	<input type="text"/>	<input type="text"/>
	SuperLife ³⁰	<input type="text"/>	<input type="text"/>
	SuperLife ⁶⁰	<input type="text"/>	<input type="text"/>
	SuperLife ⁸⁰	<input type="text"/>	<input type="text"/>
	SuperLife ¹⁰⁰	<input type="text"/>	<input type="text"/>
	Ethica	<input type="text"/>	<input type="text"/>
Sector Funds	NZ 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"/>
	Property	<input type="text"/>	<input type="text"/>
	NZ Shares Fund	<input type="text"/>	<input type="text"/>
	Australian Shares Fund	<input type="text"/>	<input type="text"/>
	Overseas Shares (Currency hedged)	<input type="text"/>	<input type="text"/>
	Overseas Shares Fund	<input type="text"/>	<input type="text"/>
	Emerging Markets Fund	<input type="text"/>	<input type="text"/>
	UK Cash Fund	<input type="text"/>	<input type="text"/>
	ETF Funds	NZ Cash ETF Fund	<input type="text"/>
NZ Bond ETF Fund		<input type="text"/>	<input type="text"/>
Global Bond ETF Fund		<input type="text"/>	<input type="text"/>
NZ Dividend ETF Fund		<input type="text"/>	<input type="text"/>
NZ Top 50 ETF Fund		<input type="text"/>	<input type="text"/>
NZ Top 10 ETF Fund		<input type="text"/>	<input type="text"/>
NZ Mid Cap ETF Fund		<input type="text"/>	<input type="text"/>
NZ Property ETF Fund		<input type="text"/>	<input type="text"/>
Australian Top 20 ETF Fund		<input type="text"/>	<input type="text"/>
Australian Dividend ETF Fund		<input type="text"/>	<input type="text"/>
Australian Financials ETF Fund		<input type="text"/>	<input type="text"/>
Australian Property ETF Fund		<input type="text"/>	<input type="text"/>
Australian Resources ETF Fund		<input type="text"/>	<input type="text"/>
Australian Mid Cap ETF Fund		<input type="text"/>	<input type="text"/>
Total World ETF Fund		<input type="text"/>	<input type="text"/>
US S&P 500 ETF Fund		<input type="text"/>	<input type="text"/>
Europe ETF Fund		<input type="text"/>	<input type="text"/>
Asia Pacific ETF Fund		<input type="text"/>	<input type="text"/>
US Growth ETF Fund		<input type="text"/>	<input type="text"/>
US Value ETF Fund		<input type="text"/>	<input type="text"/>
US Mid Cap ETF Fund		<input type="text"/>	<input type="text"/>
US Small ETF Fund		<input type="text"/>	<input type="text"/>
Emerging Markets ETF Fund		<input type="text"/>	<input type="text"/>
Total		<input type="text"/>	<input type="text"/>

If you currently have AIM^{Age Steps} and wish to change your strategy, you need to use the "change investment strategy" form.



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