

Benefit payment request

Managed incomes & lump sums

Use this form: To request a managed income benefit or lump sum withdrawal from your SuperLife account. Send this completed form to us at superlife@superlife.co.nz or post to us at PO Box 105262, Auckland City 1143.

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Your details

SuperLife number: or IRD number: - -

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

Email: Phone: ()

Home address: Post code:

Note, if you have not previously provided documents that verify your identity and confirm your address for SuperLife, as required by anti-money laundering legislation, you will need to provide them before a payment can be made. You may be able to do this electronically by phoning us on 0800 27 87 37.

Benefit payments

Complete A and B as appropriate. You can choose to take any combination. All the payments requested will be paid provided you have sufficient funds in your SuperLife account to make the payments. The order of payments will be A first, then B.

A. Lump sum payments

Complete this section if you want to take out one or more lump sum payments. Show both the amount required and the date to be paid. This can be as well as, or as an alternative to, the regular income.

Amount		Date
\$ _____	on	_____/_____/_____ / /
\$ _____	on	_____/_____/_____ / /
\$ _____	on	_____/_____/_____ / /
\$ _____	on	_____/_____/_____ / /
\$ _____	on	_____/_____/_____ / /

B. Regular managed income payments

Complete this section if you want to receive a regular managed income payment.

I want to receive a regular managed income amount of \$_____ to be paid each (tick one):

week fortnight month quarter 6 months year

I want the regular managed income to start on ____/____/____ (dd/mm/yyyy)

(this is the date the payment will appear in your bank account)

Bank account

My benefit payments should be paid to my bank account. I have enclosed a bank deposit slip or other evidence of the bank account details.

Bank: Branch:

Name:

Number: - - -

Bank Branch Account number Suffix

Payment from funds

Each payment should be deducted from my current investment funds *(tick one)*:

- Based on the SuperLife default option for payments.
- Or From each fund in proportion to my overall fund balances.
- Or From the funds as indicated below *(complete the dollar amount or the relative percentages)*.

Unless you indicate which of the funds the money should come from, it will be taken from the funds generally in the order of cash, bonds, property and shares. This will mean that your share assets are realised last and if you have not withdrawn all of your balance, you may end up with an overweight exposure to shares.

If you wish to change your investment strategy, complete a change investment strategy form or, if you are a registered SuperLife internet user, you can update it online.

_____	\$ _____	or	_____ %
_____	\$ _____		_____ %
_____	\$ _____		_____ %
_____	\$ _____		_____ %
Total	\$ _____		100 %

I understand that, if there is insufficient money in the funds I have indicated, the additional amount will be deducted from the money available in each fund in turn, under SuperLife default option for payments.

Your signature: _____

Date: / / *(dd/mm/yyyy)*