

# Add savings benefit – salary deduction

## SuperLife Invest scheme

Use this form: To start saving, if you already belong to SuperLife through your employer. Send completed form to SuperLife at [superlife@superlife.co.nz](mailto:superlife@superlife.co.nz) or post to us at P.O. Box 105262, Auckland City 1143.

SL00320 1.04.2019

SuperLife number

### Your details

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

### Savings

Subject to the rules, if any, of your employer:

#### Regular savings amount

I want to contribute to **SuperLife**, savings of \$ \_\_\_\_\_ or \_\_\_\_\_ % of my pay each pay day.

#### Initial lump sum contribution (optional)

I attach a cheque/have transferred by internet banking (12-3244-0039562-00), to make a lump sum contribution of \$ \_\_\_\_\_ Cheques should be payable to SuperLife.

### Investment strategy

I want my savings to be invested in the options indicated.

#### Investment strategy options

##### Lifecycle investment option

1. SuperLife Age Steps

Designed for the investor wanting a strategy where the risk automatically reduces as they get closer to retirement.

##### Ethical fund

2. Ethica

Ethica is a "balanced" fund that prohibits assets that do not meet its ethical 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 the chosen risk profile.

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

8. NZ Cash Fund

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

9. My Mix

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.

Tick one box

### Signature

I authorise my Employer to deduct the contributions from my pay each pay day and pay them to **SuperLife**.  
 I have received and read the Product Disclosure Statement for SuperLife Invest.

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

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

### My Mix strategy

If you ticked investment option 9. "My Mix" you must complete this section, otherwise leave it blank.

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

#### 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, and you have chosen the "My Mix" option, tick the box below. Otherwise, leave it blank. If you have chosen an investment strategy besides "My Mix", the option not to have the auto rebalancing does not apply.

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