

Add savings benefit

SuperLife Invest scheme (AS/1068)

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 or post to us at P.O. Box 105262, Auckland City 1143.

SL00320 09.11.2016

SuperLife number

Your details

Name: <input type="text"/>		Date of birth: / / (dd/mm/yyyy) <input type="text"/>	
Email: <input type="text"/>		Phone: () <input type="text"/>	
Home address: <input type="text"/>			Post code: <input type="text"/>
IRD number: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> (You must enter your IRD number)			
PIR ("Prescribed investor rate"): <input type="checkbox"/> 10.5% <input type="checkbox"/> 17.5% <input type="checkbox"/> 28% <i>Your PIR will be 28% unless you qualify for a 10.5% or 17.5% rate - see the PIR guide for more information.</i>			

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

Standard risk/return options

- 1. SuperLife^{Income}
- 2. SuperLife³⁰
- 3. SuperLife⁶⁰
- 4. SuperLife⁸⁰
- 5. SuperLife¹⁰⁰

Designed for the investor wanting "conservative", "balanced" or "growth"
The number e.g. ⁶⁰ represents the percentage in shares and property

Targeted options

- 6. AIM^{Age Steps}

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

Socially Responsible Investment option

- 7. Ethica

Ethica is a "balanced" investment option that prohibits assets that do not meet ethical standards.

Create your own strategy/portfolio

- 8. 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

My Mix strategy

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

	%
Managed Funds	
SuperLife ^{Income}	<input type="text"/>
SuperLife ³⁰	<input type="text"/>
Ethica	<input type="text"/>
SuperLife ⁶⁰	<input type="text"/>
SuperLife ⁸⁰	<input type="text"/>
SuperLife ¹⁰⁰	<input type="text"/>
Sector Funds	
NZ Cash	<input type="text"/>
NZ Bonds	<input type="text"/>
OS Bonds	<input type="text"/>
OS Non-govt Bonds	<input type="text"/>
Property	<input type="text"/>
NZ Shares	<input type="text"/>
Australian Shares	<input type="text"/>
OS shares (Currency Hedged)	<input type="text"/>
OS shares	<input type="text"/>
Emerging Markets	<input type="text"/>
UK Cash	<input type="text"/>
ETF Funds	
NZ Cash ETF	<input type="text"/>
NZ Bond ETF	<input type="text"/>
Global Bond ETF	<input type="text"/>
NZ Dividend ETF	<input type="text"/>
NZ Top 50 ETF	<input type="text"/>
NZ Top 10 ETF	<input type="text"/>
NZ MidCap ETF	<input type="text"/>
NZ Property ETF	<input type="text"/>
Aust Top 20 Leaders ETF	<input type="text"/>
Aust Dividend ETF	<input type="text"/>
Aust Financials ETF	<input type="text"/>
Aust Property ETF	<input type="text"/>
Aust Resources ETF	<input type="text"/>
Aust Mid Cap ETF	<input type="text"/>
Total World ETF	<input type="text"/>
US S&P 500 ETF	<input type="text"/>
Europe ETF	<input type="text"/>
Asia Pacific ETF	<input type="text"/>
US Large Growth ETF	<input type="text"/>
US Large Value ETF	<input type="text"/>
US Mid Cap ETF	<input type="text"/>
US Small ETF	<input type="text"/>
Emerging Markets ETF	<input type="text"/>
Total	<input type="text"/>

(Must be 100%):

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.

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 PDS for SuperLife Invest.

Your signature: _____

Date: / / (dd/mm/yyyy)