

# SuperLife contribution

Use this form: If you already belong to the SuperLife Invest scheme ("SuperLife") for savings. Send this completed form to us by email at [superlife@superlife.co.nz](mailto:superlife@superlife.co.nz) or post to us at P.O. Box 105262, Auckland City 11436.

SL00020 – 09.11.2016

## Your details

<b>Name:</b>	<b>SuperLife number:</b>
<b>Date of birth:</b> /    /    (dd/mm/yyyy)	<b>Phone</b> (    )
<b>Residential address:</b>	<b>Post code:</b>
<b>Email:</b>	

## Lump sum contribution

I wish to make a lump sum contribution to SuperLife    \$  
 of \_\_\_\_\_

I attach a cheque payable to **SuperLife** for this amount.

or  I have made this payment directly into SuperLife's bank account on    /    /    (dd/mm/yyyy)

Bank                    ASB  
 Branch                Auckland North Wharf  
 Number                12 3244 0039562 00

Please use your SuperLife member number as the reference and put your surname in the payer code.

## Regular savings

I want to contribute regular savings of    \$                    on the following frequency

- Weekly – Day of the week:    \$ \_\_\_\_\_
- Fortnightly – Start date:    \$ \_\_\_\_\_
- Monthly – Date of month:    \$ \_\_\_\_\_

## Investment strategy

I want the lump sum to be invested as indicated.

- As per my current strategy
- As follows (*tick one*)

### Investment strategy options

#### Targeted options

1. AIM<sup>Age Steps</sup>

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

#### Standard risk/return options

2. SuperLife<sup>Income</sup>

3. SuperLife<sup>30</sup>

4. SuperLife<sup>60</sup>

5. SuperLife<sup>80</sup>

6. SuperLife<sup>100</sup>

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

#### 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.

### My Mix strategy

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

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

#### Auto rebalancing of My

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.

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

Note: The Total if entered as "\$" must equal regular contribution of the initial lump sum. The Total if entered as "%" must equal 100%

### Signature

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

Date: \_\_\_\_\_ / /  
(dd/mm/yyyy)