

How to use this form

This form helps you change your investment strategy. Please take time to read the Product Disclosure Statements (PDS) relevant to your schemes if you want to know more about the choices available to you.



If you need help with changing your investment strategy then please get in touch with one of our friendly customer service members at 0800 27 87 37.

Send the completed form to SuperLife at superlife@superlife.co.nz or post to us at P.O. Box 105262, Auckland 1143. You can also make changes by going to your member login site at www.superlife.co.nz.

SECTION 1: YOUR DETAILS

SuperLife number

IRD number

FOR KIWISAVER SCHEME PLEASE USE YOUR IRD NUMBER

Name

Date of birth

Home address

Street address	
Suburb	
Town/city	Postcode
Country	

Phone

Email

SECTION 2: APPLYING YOUR CHOSEN INVESTMENT STRATEGY

We will apply your chosen investment strategy to both your existing and future savings. If you would like your investment strategy to be applied differently then please tick one of the options below.

Existing savings only

Future savings only

SECTION 3: INVESTMENT STRATEGY SELECTION

You can easily set your new investment strategy to follow a standard strategy. To do so, please select the standard strategy option you want to be applied to your accounts then complete section 5 of this form.

If you would like to specify your own investment strategy, please tick the "My Mix" option and then complete section 4.

If you do not specify a new investment strategy for accounts that you have, they will remain unchanged.

! You will be charged the SuperLife KiwiSaver scheme administration fee if your KiwiSaver account invests in any funds other than the SuperLife Default Fund. Please refer to the SuperLife KiwiSaver scheme PDS for more information.

SECTION 3: INVESTMENT STRATEGY SELECTION

All Accounts: If you would like your selection to be applied to **all** of your accounts then please select it in the “All Accounts” column.

Specific Accounts: If you would prefer to have different strategies applied to your account(s) then please specify them by ticking the options in the “Specific Accounts” column.

ALL ACCOUNTS		or	SPECIFIC ACCOUNTS				
STANDARD STRATEGIES	All		Member	Employer	Voluntary	UK Pension	KiwiSaver
Lifecycle investment option							
SuperLife Age Steps							
Diversified funds							
SuperLife Income Fund							
SuperLife Conservative Fund							
SuperLife Balanced Fund							
SuperLife Growth Fund							
SuperLife High Growth Fund							
Ethical fund							
Ethica Fund							
Cash							
NZ Cash Fund							
YOUR OWN “MY MIX” STRATEGY		All	Member	Employer	Voluntary	UK Pension	KiwiSaver
If you want to set your own investment strategy on your accounts then please select this option and then complete the following section to specify your “My Mix” selection.							

SECTION 4: "MY MIX" DETAILS

YOUR "MY MIX" STRATEGY

All Accounts: If you would like your "My Mix" choices applied to all of your accounts then please specify your chosen "My Mix" percentages in the "All Accounts" column.

Specific Accounts: If you would prefer to have different "My Mix" settings applied to your account(s) then please specify your chosen "My Mix" percentages in the "Specific Accounts" column.

ALL ACCOUNTS		SPECIFIC ACCOUNTS				
All %	Member %	Employer %	Voluntary %	UK Pension %	KiwiSaver %	
Diversified funds						
SuperLife Income Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
SuperLife Conservative Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
SuperLife Balanced Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
SuperLife Growth Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
SuperLife High Growth Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Default Fund						
SuperLife Default Fund <small>only available for KiwiSaver accounts</small>	<input type="text"/>	N/A	N/A	N/A	<input type="text"/>	
Ethical fund						
Ethica Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Guest manager fund						
Castle Point 5 Oceans Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
New Zealand shares						
S&P/NZX 50 Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Shares Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Top 50 Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Top 10 Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Mid Cap Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Dividend Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
NZ Property Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Funds continued on page 4

SECTION 4: "MY MIX" DETAILS

	ALL ACCOUNTS	or	SPECIFIC ACCOUNTS				
SECTOR FUNDS	All %		Member %	Employer %	Voluntary %	UK Pension %	KiwiSaver %
Australian shares							
S&P/ASX 200 Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Shares Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Top 20 Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Mid Cap Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Dividend Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Financials Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Resources Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Property Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US shares							
US 500 Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US Large Growth Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US Large Value Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US Mid Cap Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
US Small Cap Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
International shares							
Overseas Shares Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
International shares							
Overseas Shares (Currency Hedged) Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total World Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total World (NZD Hedged) Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Asia Pacific Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Emerging Markets Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Europe Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Global Property Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Funds continued on page 5

SECTION 4: "MY MIX" DETAILS

	ALL ACCOUNTS	or	SPECIFIC ACCOUNTS				
SECTOR FUNDS	All %		Member %	Employer %	Voluntary %	UK Pension %	KiwiSaver %
Bonds and Cash							
NZ Bonds Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
S&P/NZX NZ Government Bond Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overseas Bonds Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Overseas Non-government Bonds Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Global Aggregate Bond Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
NZ Cash Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
UK Cash Fund	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total must add to 100%	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

We will reinvest income earned back into your chosen fund(s).

Tick the option below if you would like income to be invested in the NZ Cash fund.

Reinvest into the NZ Cash fund

- !** Reinvesting into the NZ Cash fund is only suitable if you have a managed income plan and are making regular withdrawals from the scheme.

We will periodically apply standard rebalancing to maintain the proportions set out in your chosen fund(s).

Tick one of the options below if you want another option.

No rebalancing

Regular withdrawal rebalancing

- !** For regular withdrawal rebalancing, we will only rebalance by moving money from higher volatility funds (such as shares and property) to lower volatility funds (such as fixed interest and cash) and not the other way.

SECTION 5: YOUR AUTHORISATION

This form collects personal information that we use to verify your identity and address. The information collected is used to provide you with our service. All the information collected is held by SuperLife's licensed manager, Smartshares Ltd, PO Box 105262, Auckland City 1143. We will take reasonable steps to ensure that your information is protected from unauthorised access, use, modification, or disclosure (or other misuse).

Please read and tick the following boxes before signing below.

I understand that SuperLife will implement the above strategy changes as soon as practical.

Please note requests, once received by us, cannot be amended or cancelled.

Your signature

Date