

Lump sum contribution

Use this form: If you already belong to the SuperLife Invest scheme ("SuperLife") for savings. Send the completed form to us by email at superlife@superlife.co.nz or post to us at PO Box 105262, Auckland City 1143.

SL00020 – 13.12.2022

Your details

Name:						SuperLife number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth:	/	/	(dd/mm/yyyy)				Phone	()		
Residential address:								Post code:			
Email:											

Lump sum contribution

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

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 have attached a direct debit authority form and I want to contribute regular savings of:

\$ _____ each month Date of each month: (or the first business day)
 or fortnightly Start date for contributing:
 or weekly Day of week:

Investment strategy

I want the lump sum to be invested as indicated.

As per my current strategy

As follows (tick one)

Investment strategy options

1 SuperLife Age Steps

SuperLife Age Steps automatically adjusts the proportion of your investment in income and growth assets depending on your age. As you get older, the proportion of your investment in growth assets will be reduced, lowering the expected size of the ups and downs in the value of your investment.

Diversified funds

- 2 SuperLife Income Fund
- 3 SuperLife Conservative Fund
- 4 SuperLife Balanced Fund
- 5 SuperLife Growth Fund
- 6 SuperLife High Growth Fund

Ethical funds

7 Ethica Fund

Cash

8 NZ Cash Fund

Set your own investment strategy

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' on the next page.

¹ SuperLife refers to the SuperLife managed investment schemes: SuperLife KiwiSaver, SuperLife workplace savings and SuperLife Invest. For more information, see the product disclosure statements (PDS) for the schemes, available at www.superlife.co.nz

² Savings refers to your voluntary savings or individual account. Please specify further if you have more than one account

My Mix strategy

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

		Lump sum \$ or %	Regular savings \$ or %
Diversified funds	SuperLife Income Fund		
	SuperLife Conservative Fund		
	SuperLife Balanced Fund		
	SuperLife Growth Fund		
	SuperLife High Growth Fund		
Ethical fund	Ethica Fund		
Guest Manager fund	Castle Point 5 Oceans Fund		
Sector funds			
- New Zealand shares	S&P/NZX 50 Fund		
	NZ Shares Fund		
	NZ Top 50 Fund		
	NZ Top 10 Fund		
	NZ Mid Cap Fund		
	NZ Dividend Fund		
- Australian shares	NZ Property Fund		
	S&P/ASX 200 Fund		
	Australian Shares Fund		
	Australian Top 20 Fund		
	Australian Mid Cap Fund		
	Australian Dividend Fund		
	Australian Financials Fund		
	Australian Resources Fund		
- US shares	Australian Property Fund		
	US 500 Fund		
	US Large Growth Fund		
	US Large Value Fund		
	US Mid Cap Fund		
- International shares	US Small Cap Fund		
	Overseas Shares Fund		
	Overseas Shares (Currency Hedged) Fund		
	Total World Fund		
	Total World (NZD Hedged) Fund		
	Asia Pacific Fund		
	Europe Fund		
	Emerging Markets Fund		
- Bonds and cash	Global Property Fund		
	NZ Bonds Fund		
	S&P/NZX NZ Government Bond Fund		
	Overseas Bonds Fund		
	Overseas Non-government Bonds Fund		
	Global Aggregate Bond Fund		
	NZ Cash Fund		
UK Cash Fund			
Total			

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, tick the box below. Otherwise, leave it blank. If you have chosen an investment strategy other than "My Mix", automatic rebalancing always applies.

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

Note: The Total if entered as "\$" must equal the amount on page one. The Total if entered as "%" must equal 100%

Signature

Your signature:

Date: