

My Mix strategy

If you ticked investment option 8 "My Mix" you must complete this section, otherwise leave it blank and just sign the form at the bottom.

	Member %	Employer %	Voluntary %	KiwiSaver %
Managed Funds	SuperLife ^{Income}			
	SuperLife ³⁰			
	Ethica			
	SuperLife ⁶⁰			
	SuperLife ⁸⁰			
	SuperLife ¹⁰⁰			
Sector Funds	NZ Cash Fund			
	NZ Bonds Fund			
	Overseas Bonds Fund			
	Overseas Non-govt Bonds Fund			
	Property Fund			
	NZ Shares Fund			
	Australian Shares Fund			
	Overseas Shares (Currency Hedged) Fund			
	Overseas Shares Fund			
	Emerging Markets Fund			
	UK Cash Fund			
ETF Funds	NZ Cash ETF Fund			
	NZ Bond ETF Fund			
	Global Bond ETF Fund			
	NZ Dividend ETF Fund			
	NZ Top 50 ETF Fund			
	NZ Top 10 ETF Fund			
	NZ Mid Cap ETF Fund			
	NZ Property ETF Fund			
	Australian Top 20 ETF Fund			
	Australian Dividend ETF Fund			
	Australian Financials ETF Fund			
	Australian Property ETF Fund			
	Australian Resources ETF Fund			
	Australian Mid Cap ETF Fund			
	Total World ETF Fund			
	US S&P 500 ETF Fund			
	Europe ETF Fund			
	Asia Pacific ETF Fund			
	US Large Growth ETF Fund			
	US Large Value ETF Fund			
	US Mid Cap ETF Fund			
US Small ETF Fund				
Emerging Markets ETF Fund				
Total	(Must be 100%)			

Income
 Each fund receives income (for example, interest and dividends) as part of its overall investment return. Our standard practice is to automatically reinvest the income into the fund it came from. However, another option is to invest the income into the NZ Cash Fund – this may be a better option for you, particularly if you are making regular withdrawals from SuperLife.

Tick one income option:

I want each fund's income reinvested into the fund it came from (standard practice).

I want each fund's income invested in the NZ Cash Fund.

Rebalancing
 Over time, market movements will change the proportions of your investments so that they differ from the proportions you set in your My Mix investment strategy. The following options let you choose whether we rebalance your investments (i.e. move money between your funds) to maintain these proportions.

Tick one rebalancing option:

Option 1 – Standard rebalancing

Our standard practice is to regularly rebalance your investments (normally each month) to maintain the proportions you set in your My Mix investment strategy.

Option 2 – No rebalancing

You can choose not to have your investments rebalanced. If you choose this option, the proportions of your investments will change with market movements.

Option 3 – Regular withdrawal rebalancing

This option is designed for investors that want to:

- reduce the risk of withdrawing money from funds that invest in shares and property at a time when the value of those funds has fallen; and/or
- maintain a minimum level of cash and/or fixed interest.

If you choose this option, we will regularly rebalance your investments (normally each month) to maintain the proportions set in your My Mix investment strategy; however, we will only rebalance by moving money from higher volatility funds (for example, funds that invest in shares and property) to lower volatility funds (for example, funds that invest in fixed interest and cash), and will not move money the other way. This may be a better option for you, particularly if you are making regular withdrawals.

Signature

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

Your signature: _____

Date: / / (dd/mm/yyyy)