generation life

Investment Switching form

Guide to completing this form

- Use this form to switch between investment options.
- Please use BLUE/BLACK ink and complete the applicable sections in BLOCK LETTERS.

Section 1
Investor details

1.1 Investor details

Bond number

Client number (if known)

Title

Given name(s)

Surname

Date of birth

D D / M M / Y Y Y Y

Section 2
Switch between investment options

Guide to completing this section

- Refer to the current 'Generation Life Investment Menu' document on our website for investment option codes.
- The minimum investment switch amount is $50 per investment option. A minimum of $500 must be retained in an investment option after a partial switch.
- **Your Default Investment Allocation will be updated to reflect your portfolio holding weightings after executing this switch request.**
- **Your existing Regular Savings Plan and progressive investing facility allocation instructions (if applicable) will also be updated to reflect the updated Default Investment Allocation.**

2.1 Switch between investment options

Total switch amount

$

Select whether to allocate in % or $ ☐ % ☐ $

Please attach extra copies of this page if you need to provide more investment options than the space provided.

Option code	Switch from
Total (% or $)	

Option code	Switch to
Total (% or $)	

Total dollar ($) amount must equal the total switch amount provided above.
Total percentage (%) amount must equal 100%.

Please note: Your Default Investment Allocation will be updated to reflect your portfolio holding weightings after executing this switch request.

You can view your Default Investment Allocation online by logging in to Investor Online.

You can change your Default Investment Allocation at any time by providing us a completed Default Investment Allocation form.

Section 3
Declaration and signatures

3.1 Declaration

I/We declare that all details in this form are true and correct.

I/We authorise Generation Life Limited to process the instructions set out in this form.

I/We confirm that I/We have received a copy of the current Product Disclosure Statement and have read and understood the Product Disclosure Statement and agree to be bound by the terms and conditions set out in the Product Disclosure Statement.

3.2 Investor signatures

If this form is signed under Power of Attorney the attorney certifies that he/she has not received notice of revocation of that power.

If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

For more information, please refer to the ‘Completing proof of identity’ document on our website.

Investor 1

Full name (please print)

Signature

Date D D / M M / Y Y Y Y

Please select appropriate box

☐ Individual ☐ Director ☐ Trustee ☐ Power of attorney

Investor 2

Full name (please print)

Signature

Date D D / M M / Y Y Y Y

Please select appropriate box

☐ Individual ☐ Director ☐ Trustee ☐ Power of attorney generation life

Outthinking today.

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