Default Investment Allocation form

Guide to completing this form

- This form is to be completed by investors who want to establish or make changes to their Default Investment Allocation for their existing Generation Life Investment Bond.
- Please use BLACK/BLUE 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
Default Investment Allocation

2.1 Investment allocation

☐ Please establish or update my Default Investment Allocation according to the instructions provided below. Refer to the ‘Generation Life Investment Menu’ document on our website for fund codes.

Please note: By providing a new Default Investment Allocation, your existing Regular Savings Plan and progressive investing facility allocation instructions (if applicable) will be updated to reflect the investment allocation you provide below.

The new Default Investment Allocation will be used for all future contributions you make to your investment bond and does not impact your existing portfolio.

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

Fund code	Fund name	Allocation percentage (%)
	Total amount (%)	

Total percentage (%) amount must equal 100%.

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 (PDS) and have read and understood the PDS and agree to be bound by the terms and conditions set out in the PDS.

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 ☐ Financial Adviser (as Authorised Representative) ☐ 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.

Form submission
Email
enquiry@genlife.com.au
Postal address
GPO Box 263
Collins Street West
Melbourne VIC 8007

Enquiries
Investor services
1800 806 362
Adviser services
1800 333 657

Investment Bonds

LifeBuilder | ChildBuilder | FuneralBond

Australia's number one Investment Bond provider.

genlife.com.au

Issued by: Generation Life Limited ABN 68 092 843 902 AFS Licence 225408
Issue date: 18 June 2020

DIA001