

# Investment Strategy Change, Switch & Auto-Rebalancing Form

Generation Life Investment Bonds

## Guide to completing this form

Please complete this form if you want to:

- Re-weight your entire investment portfolio
- Switch between specific investment options
- Set up or update your Default Investment Allocation for future contributions
- Set up or cancel your annual Auto-rebalancing facility
- Please use BLACK/BLUE ink and complete the applicable sections in BLOCK LETTERS.

## 1. Investor details

Client number (if known)

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Account number

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Investor name

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Date of birth (dd/mm/yyyy) (if applicable)

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## 2. Type of instruction

Please select all instructions you wish to provide.

- ☐ Switch my entire investment – total portfolio re-weight (Complete **Section 3**)
- ☐ Switch part of my investment – partial switch (Complete **Section 4**)
- ☐ Default Investment Allocation – direct how future contributions are invested (Complete **Section 5**)
- ☐ Auto-rebalancing facility – add or remove the Auto-rebalancing facility (Complete **Section 6**)

**Important note:** Re-weighting or switching your portfolio (**Sections 3 and 4**) will not change your strategy for future contributions (your Default Investment Allocation). Your Default Investment Allocation is also used to allocate Regular Savings Plan contributions, Dollar Cost Averaging facility and the investment strategy for the Auto-rebalance facility. If you want to update your Default Investment Allocation, please complete **Section 5**.

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



4. Partial switch instructions

Complete this section if you want to make a partial switch to your portfolio.

Use the examples provided at the end of this form (Section 8) as a guide to perform a partial switch. Switch requests not in this format may require clarification and result in delays in processing.

**Please note:** If you want to update your Default Investment Allocation for future contributions, please also complete **Section 5**.

Switch from

Fund code	Fund name	Allocation (% or \$)
Total Allocation (\$)		

Please ensure the 'Switch to' allocation column totals 100% or the sum of dollar amounts switched.

Switch to

Fund code	Fund name	Allocation (% or \$)
Total Allocation (% or \$)		

**Complete this section if you want to direct how all future contributions are to be invested.**

**Please note:** If a Regular Savings Plan, Dollar Cost Averaging facility or Auto-rebalancing facility is already established on your account, completing **Section 5** will also update the existing allocation strategies for these features on your account.

☐ according to the instructions provided in **Section 3**.  
(this option is only available if you have also requested for a total portfolio re-weight.)

☐ according to the instructions in the below table.  
(if you have more investment options, please attach a separate list.)

Allocation percentage must total 100% %

**Complete this section if you want to add or remove the Auto-rebalancing facility.**

☐ Add the annual Auto-rebalancing facility.

☐ Cancel my annual Auto-rebalancing facility.

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## 7. Declaration and signatures

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 acknowledge that the processing of my/our instructions may be delayed if the form is incomplete.

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.

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.

### Signature of Investor 1

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director ☐ Power of attorney

Name (please print)

Signature

Date (dd/mm/yyyy)

 /  / 

### Signature of Investor 2

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director/Company secretary ☐ Power of attorney

Name (please print)

Signature

Date (dd/mm/yyyy)

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### You can submit this form by:

**Email:** enquiry@genlife.com.au

**Mail:** GPO Box 263, Collins Street West, Melbourne VIC 8007

## 8. Partial switching examples

Please use the following examples as a guide to perform your partial switch.

Switch requests not in this format may require clarification and result in delays in processing. If you are unsure about how to complete your switch request, please contact us on 1800 806 362.

### Switches by percentage example

Switch 70% of my investment in Fund A and 100% of my investment in Fund B into Funds C, D and E. Of the total value of proceeds from these investments, invest (switch) 30% into Fund C, 50% into Fund D and 20% into Fund E.

#### Switch from

Fund code	Fund name	Allocation (% or \$)
11	Fund A	70%
22	Fund B	100%
Total Allocation (\$)		

#### Switch to

Fund code	Fund name	Allocation (% or \$)
33	Fund C	30%
44	Fund D	50%
55	Fund E	20%
Total Allocation (% or \$)		100%

### Switches by amount example

Switch \$10,000 of my investment in Fund A and \$10,000 of my investment in Fund B into Funds C, D and E. Of the total value of proceeds from these investments, invest (switch) \$10,000 into Fund C, \$5,000 into Fund D and \$5,000 into Fund E.

#### Switch from

Fund code	Fund name	Allocation (% or \$)
11	Fund A	\$10,000
22	Fund B	\$10,000
Total Allocation (\$)		\$20,000

#### Switch to

Fund code	Fund name	Allocation (% or \$)
33	Fund C	\$10,000
44	Fund D	\$5,000
55	Fund E	\$5,000
Total Allocation (% or \$)		\$20,000

### Combination switches example

Switch \$10,000 of my investment in Fund A and \$10,000 of my investment in Fund B into Funds C, D and E. Of the total value of proceeds these investments, invest (switch) 30% into Fund C, 50% into Fund D and 20% into Fund E.

#### Switch from

Fund code	Fund name	Allocation (% or \$)
11	Fund A	\$10,000
22	Fund B	\$10,000
Total Allocation (\$)		\$20,000

#### Switch to

Fund code	Fund name	Allocation (% or \$)
33	Fund C	30%
44	Fund D	50%
55	Fund E	20%
Total Allocation (% or \$)		100%