

# Investment Strategy Change, Switch & Auto-Rebalancing Form

Generation Life Investment Bonds

_				
		comp		

- 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.

Investor details
Client number (if known)
Account number

Account number		
Investor name		
Date of birth (dd/mm/yyyy) (if applicable	<u>)</u>	

## 2. Type of instruction

Plea	se 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 <b>Section 4</b> )
	Auto-rebalancing facility – add or remove the Auto-rebalancing facility (Complete <b>Section 5</b> )
	Default Investment Allocation – direct how future contributions are invested (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 nominate or update your Default Investment Allocation, please complete Section 6.

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

# 3. Total portfolio re-weight instructions

Complete this section if you want a total re-weight of your portfolio.

Please note: If you want to update your Default Investment Allocation for future contributions, please also complete Section 6.

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

## **Investment Allocation**

Fund name	Allocation (%)
Allocation percentage must total 100%	<b>6</b> %

Note: There may be a delay in processing your request if the total allocation does not equal 100%.

## 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 6.

witc		

Fund name		Allocation (% or \$)
	Total Allocation (\$)	
Switch to		
Fund name		Allocation (% or \$)
	Total Allocation (% or \$)	

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

► FORM CONTINUES OVER PAGE

6.

# 5. Auto-rebalancing facility instructions

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

**Note:** If you select the annual Auto-rebalancing facility, your portfolio will be rebalanced annually in accordance with your Default Investment Allocation. Refer to the current Product Disclosure Statement for terms and conditions. Complete Section 6 to nominate or update your Default Investment Allocation.

Allocation percentage must total 100%	%
Fund name	Allocation (%)
according to the instructions in the below table.  (if you have more investment options, please attach a separate list.)	
OR	
according to the instructions provided in <b>Section 3</b> . (this option is only available if you have also requested for a total portfolio re-weight.)	
All future contributions are to be invested:	
<b>Please note:</b> If a Regular Savings Plan, Dollar Cost Averaging facility or Auto-rebalancing facility is already established completing <b>Section 6</b> will also update the existing allocation strategies for these features on your account.	d on your account,
<b>Please note:</b> If you do not make a selection or the provided allocation percentage does not total 100%, your Default I not be updated.	nvestment Allocation will
Complete this section if you want to direct how all future contributions are to be invested.	
Default Investment Allocation - Investment instructions for future contribution	ons
Cancel my annual Auto-rebalancing facility.	
Add the annual Auto-rebalancing facility.	
If you have a current active Dollar Cost Averaging facility in place at the time of the scheduled annual Auto-rebalancing rebalance will not occur.	g, your armual Auto-

► FORM CONTINUES OVER PAGE

## 7. Declaration and signatures

Signature of Investor 1

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 lifestor i	
Please select the appropriate box	
Individual Trustee Director Power of attorney	
Name (please print)	
Signature	Date (dd/mm/yyyy)
X	
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)
X	
Veneza antimitati de marten	
You can submit this form by:	
Email: enquiry@genlife.com.au	
Mail: GPO Box 263, Collins Street West, Melbour	ne 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 Switch to

Fund name	Fund code	Allocation (% or \$)	Fund name	Fund code	Allocation (% or \$)
Fund A	11	70%	Fund C	33	30%
Fund B	22	100%	Fund D	44	50%
			Fund E	55	20%
	Total Allocation (\$)		To	otal 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 Switch to

Fund name	Fund code	Allocation (% or \$)	Fund name	Fund code	Allocation (% or \$)
Fund A	11	\$10,000	Fund C	33	\$10,000
Fund B	22	\$10,000	Fund D	44	\$5,000
			Fund E	55	\$5,000
	Total Allocation (\$)	\$20,000	To	otal 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 Switch to

Fund name	Fund code	Allocation (% or \$)	Fund name	Fund code	Allocation (% or \$)
Fund A	11	\$10,000	Fund C	33	30%
Fund B	22	\$10,000	Fund D	44	50%
		_	Fund E	55	20%
	Total Allocation (\$)	\$20,000	То	otal Allocation (% or \$)	100%