ConfidencePlus feature quotation request form

Generation Life LifeIncome

About ConfidencePlus

ConfidencePlus is an optional feature that offers a guarantee, in return for a premium, that your annual income from the ConfidencePlus investment option(s) will not fall below a minimum level, known as your "Floor Income" for four consecutive Annual Income Resets.

Please refer to the LifeIncome Product Disclosure Statement for more information on ConfidencePlus.

Important information

This form is for requesting a quotation only and does not constitute an instruction to select ConfidencePlus.

If you wish to select ConfidencePlus, you will need to submit a completed and signed 'ConfidencePlus feature request form', available on our Adviser Online portal. You do not need to obtain a quotation before selecting ConfidencePlus to apply to your LifeIncome, however it is recommended that you speak to your financial adviser before submitting a request.

Your Floor Income will be determined at the effective date we receive the instruction to select ConfidencePlus, after your request has been validated. This amount may be different than stated in the quotation you receive, as one of the determinants of Floor Income is age.

To receive multiple quotes with different investment options or allocations, please submit a separate version of this form for each request.

Guide to completing this form

Use this form to submit a request to obtain a ConfidencePlus quotation if you are an existing LifeIncome investor.

Please complete these instructions in BLACK/BLUE INK using CAPITAL LETTERS.

1. Investor details

Client number (if known):

Account number:

Investor name:

Date of birth:

2. ConfidencePlus Quotation – No Change to Investment Allocation

Complete this section if you are currently invested in a ConfidencePlus investment option and would like to select the feature on one or more of those investment option(s).

Please indicate if you wish to select ConfidencePlus to your current ConfidencePlus investment option(s):

Code	Fund name	
LI31A	BlackRock® Enhanced Strategic Conservative Portfolio	☐ Yes, I would like to obtain a quote to select ConfidencePlus.
LI31B	BlackRock® Enhanced Strategic Balanced Portfolio	☐ Yes, I would like to obtain a quote to select ConfidencePlus.
LI31C	BlackRock® Enhanced Strategic Growth Portfolio	☐ Yes, I would like to obtain a quote to select ConfidencePlus.

3. ConfidencePlus Quotation – Change to Investment Allocation

Complete this section if you would like to switch into a ConfidencePlus investment option and select the ConfidnecePlus feature on one or more of these investment option(s).

Please note, the minimum allocation for an investment option is 1% of the value of your Income Units.

Please complete the 'Investment Allocation' table below:

Investment Allocation

Code	Fund name	Allocation[1]	ConfidencePlus feature (Yes/No)
LI01	PIMCO Wholesale Global Bond Fund		
LI02	iShares Wholesale Australian Equity Index Fund		
LI03	iShares Wholesale International Equity Index Fund		
LI04	iShares Hedged International Equity Index Fund		
LI05	iShares Wholesale Australian Listed Property Index Fund		
LI06	iShares Wholesale Australian Bond Index Fund		
LI07	Vanguard Conservative Portfolio		

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LI08	Vanguard Balanced Portfolio			
LI09	Vanguard Growth Portfolio			
LI10	Dimensional World 50/50 Portfolio			
LI11	Dimensional World 70/30 Portfolio			
LI12	Schroder Real Return Fund			
LI13	Vanguard High Growth Portfolio			
LI14	Dimensional World 30/70 Portfolio			
LI15	Dimensional World Equity Portfolio			
LI16	AB Managed Volatility Equities Fund			
LI17	Bennelong Concentrated Australian Equities Fund			
LI18	Hyperion Global Growth Companies Fund			
LI19	Barrow Hanley Global Share Fund			
LI20	ATLAS Infrastructure Global Fund (Hedged)			
LI21	Ardea Real Outcome Fund			
LI22	Pendal Sustainable Balanced Fund			
LI23	Dimensional Global Bond Sustainability Trust			
LI24	Mirova Global Sustainable Equity Fund			
LI25	Investors Mutual Australian Share Fund			
LI26	Generation Life Cash & Deposits Portfolio			
LI27	Generation Life Lifestyle Portfolio			
LI28	Generation Life Protect Portfolio			
LI30	MCP Wholesale Investments Trust			
LI31A	BlackRock® Enhanced Strategic Conservative Portfolio		☐ Yes	☐ No
LI31B	BlackRock® Enhanced Strategic Balanced Portfolio		☐ Yes	☐ No
LI31C	BlackRock® Enhanced Strategic Growth Portfolio		☐ Yes	☐ No
Allocation percentage must total 100.0%				

(1) Percentage is limited to one decimal place.

You can submit this form by:

Email: enquiry@genlife.com.au

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

RESET FORM