generation life

ConfidencePlus feature 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.

Important information

Your Floor Income will be determined at the effective date we receive a signed and completed form, after your request has been validated. This amount may be different than stated in the quotation you received (if applicable), as one of the determinants of Floor Income is age. Importantly, selecting ConfidencePlus will not affect your annual income for the current financial year.

Please note, switches will be subject to buy/sell spreads.

If you have a Dollar Cost Averaging facility that is not yet complete, this request will cancel that facility.

A switch in or out of a ConfidencePlus investment option(s) with an active ConfidencePlus feature will impact your Floor Income.

Please refer to the Product Disclosure Statement (PDS) for more information on ConfidencePlus or speak to your financial adviser.

Guide to completing this form

Use this form to select the ConfidencePlus feature.

Please complete these instructions in BLACK/BLUE INK using CAPITAL LETTERS (except for your email address).

1. Investor details

Client number (if known):

Account number:

Investor name:

Date of birth:

2. Existing ConfidencePlus feature

Complete this section if you have an active ConfidencePlus feature, otherwise go to next step.

☐ No, I am not requesting a change to any ConfidencePlus investment option(s) that has an active ConfidencePlus feature.

☐ Yes, I understand that this instruction cancels any active ConfidencePlus feature and that no refund applies to any unused ConfidencePlus premium.

3. ConfidencePlus feature – No Change to Investment Allocation

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

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

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

4. ConfidencePlus feature – Change to Investment Allocation

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

Please note, switching can impact active ConfidencePlus feature(s). For more information, please refer to the ConfidencePlus - additional information section of the PDS.

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)[2]
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		
LI08	Vanguard Balanced Portfolio		
LI09	Vanguard Growth Portfolio		
LI10	Dimensional World 50/50 Portfolio		

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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.

(2) You can invest in the ConfidencePlus investment option(s) without selecting the ConfidencePlus feature.

5. Declaration and signature

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

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

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

I acknowledge that movements in and out of the same investment option will incur a buy/sell spread.

^I acknowledge that if I invest in Limited Liquidity investment options in my Generation Life LifeIncome , these investment options may limit or delay my ability to make withdrawals, switch from, or for Generation Life to pay death benefit payments from these investment options, and I acknowledge that the ability to make a withdrawal and receive proceeds is not generally available on a daily basis.

I confirm that I 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.

I acknowledge where a valid switch request is received on or prior to 12:00 pm (Melbourne time) on a Melbourne Business Day, the request will generally be processed using the unit price applying to the close of business that day. Should the request be received after 12.00 pm (Melbourne time), the request will be processed using the unit price applying to the following Melbourne Business Day.

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

Name (please print):

Signature:

Date:

(DD/MM/YYYY)

Please select the appropriate box:

☐ Individual ☐ Power of Attorney

You can submit this form by:

Email: enquiry@genlife.com.au

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

RESET FORM