Lifetime INVESTMENTS

SUPERANNUATION MASTER TRUST

Changing your Investment Portfolio

Please send this completed form and supporting documents to:

lifetime@linkmarketservices.com

Lifetime Asset Management, PO Box 91976, Victoria Street West, Auckland 1142.

If you have any questions when completing this form, please call Customer Services on 0800 266 268.

Use this form to switch your existing investments to a different investment portfolio and/or change where your future contributions will be invested.

This form can be completed on-screen by typing content directly into the PDF document. Once you have completed and signed this form, please send it and any supporting documentation to the address above.

*These sections must be completed

*(a) Your personal details

Plan number (if known)

Date of birth

First names

Surname

Email address

*(b) New investment instructions

Please make the following changes to the Investment Portfolios in which my total accounts and/or contributions are invested.

I confirm that these changes are consistent with the options available to me in the scheme.

Please tick (you can tick more than one)

A ☐ Switch **only** my current balance to the Investment Portfolio(s) selected below.

B ☐ Invest **only** my future regular contributions in the Investment Portfolio(s) selected below.

C ☐ Switch **both** my current and future contributions in the Investment Portfolio(s) selected below.

and/or

D ☐ Invest a lump sum contribution in the Investment Portfolio(s) selected below.

Funds will be transferred from ______ (e.g. ABC Superannuation Fund).

Investment options	% of total accounts	**Investment options**	% of total accounts
Diversified Portfolios		Lifetime NZ Bond Fund	%
Lifetime Conservative Fund	%	Lifetime Overseas Bond Fund	%
Lifetime Balanced Fund	%	Lifetime International Property Fund	%
Lifetime Growth Fund	%	Lifetime Australasian Property Fund	%
Sector Portfolios	%	Lifetime Australasian Shares Fund	%
Lifetime Cash Fund	%	Lifetime Overseas Shares Fund	%
Lifetime UK Cash Fund	%	**Total Contributions**	**100%**

Do you have an Adviser?
(i.e. and Individual who is authorised to provide financial advice to you in relation to Lifetime products.)

☐ Yes ☐ No

If **yes**, please ensure your Adviser completes section (d).

*(c) Members Agreement

To: Lifetime Asset Management Limited (**Lifetime**)

1. I understand that if Lifetime accepts these investment instructions, they will be implemented as soon as possible after Lifetime has received them, and will apply until I advise Lifetime otherwise.
2. I acknowledge that any fees payable will be deducted from my account.
3. I acknowledge that tax will be calculated and debited (where appropriate) at my recorded PIE tax rate and that it is my responsibility to notify Lifetime of my correct PIR.
4. I acknowledge that if for any reason Lifetime is not able to accept or process these investment instructions, Lifetime will contact me. Until such time as these investment instructions are accepted and processed by Lifetime, any contributions I make will be invested in accordance with the existing investment instructions.
5. I acknowledge that neither the Supervisor, nor the Manager guarantee the performance of the investment funds selected.
6. I confirm that the above information is correct and I request that Lifetime update its records to reflect the changes specified in this form.

Member's signature

Date

*(d) Adviser use only

Adviser Name

Adviser Name

Adviser's business name

I certify that I have completed the most recent training provided by Lifetime for this product, and have complied with the requirements of the Financial Markets Conduct Act 2013, and all other applicable laws.

Signature of Adviser

Date