

# Switch and change of future investment strategy

# PERSONAL SUPERANNUATION & ROLLOVER PLAN

#### Important information

This form must be mailed to: Resolution Life, Locked Bag 5075, Parramatta NSW 2124

Contact phone number: 13 20 15 between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.

#### Please note:

Changes will be made effective the date your completed documentation is received at our principal office of administration.

## Section 1 - Personal details (all fields must be completed)

Account number				
(If changing your name and/or address, please	write your name ar	nd/or address that wa	s last notifie	ed.)
Title 🗌 Mr 🗌 Mrs 🗌 Miss 🗌 Ms [	☐ Other (please s	pecify)		
Given name(s)		Surname		
Postal address				
	State	Postcode	Country	
Residential address				
	State	Postcode	Country	
Mobile number	Alternate phone number			Date of birth (dd/mm/yyyy)
Email address				

#### Section 2 - Switching investment options and/or changing your future investment strategy

Switching investment options. Please tick ( v) the appropriate box:

#### I wish to switch my investment options.

Please complete both columns below headed 'Switch from' and 'Switch to'.

To fully switch out of an investment option(s), please place 100% or 'ALL' next to each investment option in the 'Switch from' column. If you nominate a percentage amount of less than 100%, we will only withdraw that percentage of the investment option, e.g. if you have \$20,000 in the investment option and specify 50%, we will withdraw \$10,000 from that investment option. The total proceeds from your specified 'Switch from' investment option(s) will be used to buy the amounts indicated in the 'Switch to' column. Your 'Switch to' column must add up to 100% if using percentages, or the exact amount specified in A if using dollar amounts.

#### I wish to change where my future contributions are invested.

Please complete the right hand column below headed 'future contributions'.

# Section 2 – Switching investment options and/or changing your future investment strategy (continued)

		Investment option		Switch from (dollar (\$) or percentage (%))	Switch to (dollar (\$) or percentage (%))	Future contributions (%)
TEGY	Aggressive	Multi-Manager Australian Share	PS	\$/%	\$/%	
	Aggre	High Growth	PG	\$/%	\$/%	
	Growth	Growth	М3	\$/%	\$/%	
STRATEGY	Moderate	Balanced	РВ	\$/%	\$/%	
	Isive	Capital Secure	СЗ	\$/%	\$/%	
	Defensive	Savings	R3	\$/%	\$/%	
		Total		(A) \$ / %	<b>(B)</b> \$ / %	
					100%	100%

Please note: Minimum switch amount of \$1,000 applies. Switches are effected at the applicable withdrawal and deposit price.

## Section 3 – Declaration and acknowledgement

By signing this form I declare as follows:

• That the information provided on this form is correct.

• I request that your records be updated to reflect the changes indicated.

Member's signature

Date (dd/mm/yyyy)

/ /