# Application to switch investment options

**Important information**

This form must be mailed to: **Resolution Life, GPO Box 3306, SYDNEY NSW 2001**

For further information, please call us on **133 731** between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.

## Section 1 – Personal details (all details must be completed)

Policy number ____________ Client number ____________

Type of policy (**please tick (✔) one box**)

☐ Trustee Bond ☐ Insurance Bond ☐ Deferred Annuity ☐ Allocated Annuity

Name(s) of all Policy owner(s)

| Full name | Date of birth (dd/mm/yyyy) |
|---|---|
| Full name 1 | / / |
| Full name 2 | / / |
| Full name 3 | / / |
| Full name 4 | / / |

Residential address

Postal address

Mobile number ____________ Alternate phone number ____________

Email address

## Section 2 – Investment strategy

For a total switch, list the investment options you want to switch into under **New holding**.

For a partial switch, list only the relevant investment options you want to switch out of under **Current holding** and then list the investment options you want to switch into under **New holding**.

**Please note:** You may not be able to switch funds to all of the listed investment options. To find out which of these investment options are available to your policy, refer to the table at the end of this form.

## Section 2 – Investment strategy (continued)

| Investment options | Current holding | | New holding (after switch) | |
|---|---|---|---|---|
| | Percentage (%) | Amount ($) | Percentage (%) | Amount ($) |
| **Insurance Bonds** | | | | |
| Guaranteed Cash | | | | |
| Capital Guaranteed (Max 70%) | | | | |
| Conservative 5 | | | | |
| Growth 12 | | | | |
| Growth 13 | | | | |
| Fixed Interest 2 | | | | |
| Australian Share 13 | | | | |
| **Trustee Bonds, Deferred Annuities and Allocated Annuities** | | | | |
| Guaranteed Cash | | | | |
| Capital Guaranteed | | | | |
| Conservative 3 | | | | |
| Growth 2 | | | | |
| Australian Share 6 | | | | |
| Diversified Fixed Interest 2 | | | | |
| **Total** | % | $ | % | $ |

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# Available investment options

## Section 2 – Investment strategy (continued)

When you look up the name of your policy in this list, ignore the prefix 'Free Entry Plus'. For example, if you have a Free Entry Plus Insurance Bond, you should look for Insurance Bond.

| | Investment options | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Guaranteed Cash** | **Capital Guaranteed** | **Conservative 5** | **Growth 12** | **Growth 13** | **Australian Share 13** | **Fixed Interest 2** |
| **Insurance Bonds** | | | | | | | |
| Insurance Bond (Series III, Series IV) | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Insurance Bond<br>Insurance Bond (Imt Offer)<br>Multi Option | ✔ | ✔ | ✔ | ✔ | ✔ | – | – |
| Managed Investment Bond Bond 2000 | ✔ | – | – | – | ✔ | – | ≠ |
| Insurance Bond Limited Offer | – | ✔ | – | – | – | – | – |
| Insurance Bond Security Plus | – | – | ✔ | – | – | – | – |
| Insurance Bond Maturity<br>Guaranteed Insurance Bond I/ Linked<br>Insurance Bond Series 1<br>Insurance Bond Old Series | – | – | – | – | ✔ | – | – |

## Section 2 – Investment strategy (continued)

| | Investment options | | | | | |
|---|---|---|---|---|---|---|
| | **Guaranteed Cash** | **Capital Guaranteed** | **Conservative 3** | **Growth 2** | **Australian Share 6** | **Diversified Fixed Interest 2** |
| **Trustee Bonds** | | | | | | |
| Trustee SuperBond (Series III) | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| Trustee Superannuation Bond | ✔ | ✔ | ✔ | ✔ | – | – |
| SuperBond<br>SuperBond 2000 | ✔ | – | – | ✔ | – | – |
| **Deferred Annuities** | | | | | | |
| SuperBridge (Series III, Series IV)<br>SuperSpan Plus (Series III, Series IV) | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |
| SuperSpan Limited Offer (Multi Option)<br>SuperSpan II (Multi Option)<br>SuperBridge<br>SuperSpan Plus | ✔ | ✔ | ✔ | ✔ | – | – |
| Rollover Deferred Annuity | ✔ | – | – | ✔ | – | – |
| SuperCash | ✔ | – | – | – | – | – |
| SuperSpan Limited Offer<br>SuperSpan II | – | ✔ | – | – | – | – |
| SuperBridge (I/L, New Series) | – | – | – | ✔ | – | – |
| **Allocated Annuities** | | | | | | |
| TAP - Allocated Annuity Free Entry TAP - Allocated Annuity | ✔ | ✔ | ✔ | ✔ | ✔ | ✔ |

## Section 3 – Declaration and acknowledgment

By signing this form I declare as follows:
I/We apply to switch the investment options on my policy as outlined above.

Policy owner's 1 signature ✗

Date (dd/mm/yyyy) / /

Policy owner's 2 signature ✗

Date (dd/mm/yyyy) / /

Policy owner's 3 signature ✗

Date (dd/mm/yyyy) / /

Policy owner's 4 signature ✗

Date (dd/mm/yyyy) / /

### What you need to know

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