

Switch request

Information sheet

When to use this form

Use this form to switch your investments between existing investment options or to switch in to new investment options. You can also use this form to change your regular pension (income) payment method.

Important information

Note: Before completing your switch request, you should read and understand the following information:

- We'll use the unit price next calculated where we receive all relevant information at a Resolution Life processing centre by 3pm Sydney time. If we receive the information after 3pm Sydney time, we'll treat it as if we received it the next Sydney business day.
- Once this request has been submitted, it **can't** be cancelled.
- Switching between investment options is permitted at any time.
- At any one time your plan can have a maximum of 10 investment options.
- There is currently no fee for switching between investment options. We may delay switches out of the Secure Growth investment option in certain circumstances.
- If there are insufficient funds in a nominated investment option to deduct your pension (income) payment from, then the full amount of the deduction will be taken proportionally across all investment options.
- For more product information (including fees and costs on all investment options) please visit resolutionlife.com.au/performance, select **MultiFund Flexible Income Plan** from the **Retirement Funds** drop down box, and refer to the documents under the **Investment Report** and **Fees & Costs** sections.

Other documents required

If you're signing under a Power of Attorney

If you're signing under a Power of Attorney (that is more than five years old), you must submit a letter (with your completed form) stating that you haven't received a notice of revocation of that Power of Attorney.

Note: If a certified copy of the Power of Attorney hasn't been previously provided to us, you must also submit this with the completed form.

Privacy and your personal information

We're committed to making sure that the personal information you provide to us remains secure, is only used for the purposes for which it's collected and that you're aware of what information is held and your rights.

We collect your personal, and in some circumstances, your sensitive information (eg your identity, contact details, age, gender and financial information), from you directly or from those authorised by you (eg family members, financial advisers, your employer, other insurers), as well as others we consider necessary including our partners, associates, government entities or service providers.

The information we collect is used to enable us to provide our products and services including to process and settle claims and complaints, verify your identity, make offers of products and services provided by us, and conduct market or customer research to determine those products or services that may suit you.

The types of information we collect will depend on your relationship with us and we'll only collect your personal information where we are required to or as authorised under various laws including privacy and data collection, financial services, superannuation, taxation and anti-money laundering and counter-terrorism financing laws.

We may disclose your personal and sensitive information to others with whom we have business arrangements for the purposes listed above and may include our trustee, insurers, reinsurers, service providers we engage to provide us with services, advisers, or where the disclosure is required to government, law enforcement, dispute resolution, statutory or regulatory bodies. Some of these third parties may be located outside the country of collection such as India, Taiwan, United Kingdom, and the United States of America.

When you provide personal information about other individuals, we rely on you to have made them aware that you are providing the information to us, how they can access it and all other matters described in this privacy notice. We rely on you to have obtained their consent on these matters.

You can seek access to and correct your personal information by contacting us. You can't access or correct personal information of others unless you've been authorised by them or are authorised under law or they're your dependants.

If you don't agree with the above or provide us with your personal and sensitive information as required, we may not be able to provide you with our products or services.

For more information about our handling of personal and sensitive information, including further details about access, correction, and complaints please read our **privacy policy** by visiting resolutionlife.com.au/privacy or by contacting us on 133 731.

Please keep this information sheet for your records—
don't return it with your completed form(s).

This document is issued by Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) the product issuer of your product, MultiFund Flexible Income Plan. Your product may have been issued directly from Resolution Life or through a superannuation product issued by Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL No. 229757, RSE Licence No. L0001458 as trustee of the National Mutual Retirement Fund ABN 76 746 741 299, for which Resolution Life provides administration services. The information contained in this document is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you. This information is not intended to represent or be a substitute for professional financial or tax advice. Resolution Life is part of the Resolution Life Group and can be contacted on 133 731 or askus@resolutionlife.com.au.

Switch request

Use this form to switch your investments between existing investment options or to switch in to new investment options. You can also use this form to change your regular pension (income) payment method.

Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

1. Switch options

What do you want to do? (You can select more than one)

Change your pension (income) payment method > Complete sections 1, 2, 3, 4 and 5.

Switch investment options > Complete sections 1, 2, 4, 5 and the appendix.

2. Personal details

Plan number

Product type

Title Date of birth

Surname

Given name(s)

Residential address

Suburb State Postcode

Contact phone number Mobile number

Email address

3. Pension (income) payment method

I'd like to vary my regular pension (income) payment method to (select one only):

Default payment option—we'll deduct your pension (income) payments from each investment option proportionately.
Note: Don't complete **column C** in the attached **appendix** if you select this option.

Nominated payment option—we'll deduct your pension (income) payments from your nominated investment options in the proportions that you request in **column C** of the **appendix**.
Note: If there are insufficient funds in one or more of the selected investment options to pay the full specified proportion, units will be released from investment options in the manner and proportions chosen by the Trustee.

4. Authority and signature

I declare that:

- I've read and understood the **privacy and your personal information** section in the attached information sheet.
- I acknowledge that I can only submit one investment option selection request per Sydney business day before 3pm.
- I understand that once this request has been submitted it can't be cancelled.
- I've read the relevant information provided in the **investment report** available on **resolutionlife.com.au** and have considered advice from my financial adviser (if applicable).
- I've read and understood all of the information provided in the enclosed **switch request** information sheet.
- I understand the risk and effects of my investment choices.
- I direct the Trustee to complete the switch between the investment options as specified on this form.
- Changing my investment options may change the risk profile of my investments.
- I understand that there may be a delay in processing my request if:
 - Resolution Life hasn't provided a unit price because it is unable to value the assets of any investment option for reasons beyond its control, or
 - the total of the number of switches on any day may adversely affect the interests of other members.

Signature of member



Date

D	D	M	M	Y	Y	Y	Y
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5. Checklist

- If applicable, have you indicated which investment options you'll be switching **FROM** and **TO** (in the **appendix**)?
- Do all percentages (where applicable) add up to 100%?
- Have you provided us with instructions for your future investment profile (where applicable)?
- Have you completed, signed and dated this form?
- If applicable, have you submitted a **notice of non-revocation** letter and a certified copy of the Power of Attorney?

Where to send this form

Email or mail the completed form to:

askus@resolutionlife.com.au
Resolution Life Customer Service
GPO Box 5441
Sydney NSW 2001
133 731

Appendix

Switch investment options

Please read the following instructions before completing this section:

- If you're switching part of your existing investments using dollar amounts, the **total \$ switch amount** for **column A** and **column B** must be equal.
- At any one time your plan can have a maximum of 10 investment options.

What do you want to do?

- | | |
|--|--|
| <input type="checkbox"/> Switch your existing investments | > Complete column B only (this column must total 100%). |
| <input type="checkbox"/> Switch part of your existing investments | > Complete columns A and B (enter either \$ or %). |
| <input type="checkbox"/> Change your future pension (income) payments ⁽ⁱ⁾ | > Complete column C (this column must total 100%). |

(i) If your investments have changed you must specify how you want your future pension payments to be made—to do this, complete **Column C**. If you do not complete this column, your pension payments will be deducted from your investments proportionately.

Investment sectors and options	Code	Switch FROM these options (column A) \$ or %	Switch TO my nominated profile (column B) \$ or %	Future pension (income) payments (column C) %
Multi-sector investment options				
All Growth	FC			
Balanced Growth	FV			
Conservative	FZ			
High Growth	F9			
Moderate Growth	FF			
Single-sector investment options				
Australian Bond	KF			
Australian Share	FE			
Australian Share 2	KA			
Australian Share 4	MQ			
Australian Share 5	KG			
Cash	FD			
Future Directions Australian Bond	ME			
Future Directions International Bond	MF			
Hedged International Share	MM			
International Bond 2	MJ			
International Share 2	F4			
International Share 3	ML			
Listed Property Trusts	FO			
Managed Income	FW			
Secure Growth	SC			
Specialist Australian Share	MG			
Specialist International Share	MH			
Specialist Property and Infrastructure	MK			
Closed investment options				
Australian Share 3 ⁽ⁱⁱ⁾	F3			
International Bond ⁽ⁱⁱ⁾	F6			
International Share ⁽ⁱⁱ⁾	FI			
Total \$ switch amount (if applicable)				100%

(ii) This investment option is closed to investors who are not currently invested in these options. Once all funds have been withdrawn from this option they can't be reinvested in the closed option.

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