

Application for switching investment options

Use this form to switch funds between your investment options for the following products:

- **MultiFund – Rollover, Super Bond or Trustee Bond** (Tables: ULMD, ULMDN, ULMB, ULMBN and ULMT)
- **Investment Linked, Flexible Income Pension** (Tables: ULASP, ULNSP, ULAN, ULK, ULKN and ULKP)

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

1. Personal details

Owner 1 details/Member details

Plan number

Product type

Title Date of birth

Surname

Given name(s)

Residential address (a PO Box is not acceptable)

Suburb State Postcode

Contact phone number Mobile number

Email address

By providing your email address, you consent to receiving all future communications, including information about products and services offered by Resolution Life, to the above email address.*

Address for communications

Please cross if same as residential address.

Address

Suburb State Postcode

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Resolution Life Australasia Limited ABN 84 079 300 379

*We may use or disclose your personal information to contact you for purposes relating to the administration, operation and management of your policies with us. We may also send you information about products and services offered by Resolution Life. You may opt out of receiving direct electronic marketing communications from us at any time.

1. Personal details (continued)

Owner 2 details (if applicable)

Title Date of birth

Surname

Given name(s)

Residential address (a PO Box is not acceptable)

Suburb State Postcode

Contact phone number Mobile number

Email address

By providing your email address, you consent to receiving all future communications, including information about products and services offered by Resolution Life, to the above email address.

2. Switch information

- ! – You should consider the current investment objectives, strategies and risk profile of an investment before you switch. These are shown in the latest **investment report**.**
- You must switch at least \$1,000. You must leave at least \$1,000 in the option you switch **FROM**, or switch the whole balance and close that option.
- For market linked investment options, we use the unit price calculated after we receive all necessary information at a Resolution Life processing centre by 3pm Sydney time.
- We may delay a switch until the fund manager for the investment option gives us an asset value.
- If you switch out of a no entry fee plan, we will transfer your oldest investments first.
- You can only switch between the investment options available for your plan—see the investment switch table in the **appendix**.

3. Agreement and declaration

- I have the latest **investment report**** for my plan which includes the current investment objectives, strategies and risk profile of the available investment options.
- I understand the risk and effects of my investment choices.
- I direct Resolution Life Limited/Equity Trustees Superannuation Limited to complete the switch(es) as outlined in the attached **appendix**.
- 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 cannot be cancelled.

Signature of owner 1/member

Date

Signature of owner 2 (if applicable)

Date

Note: Where any owner is under the age of 16, consent of a parent/guardian is required.

Signature of parent/guardian (if applicable)

Date

4. Checklist

- Have you indicated which investment options you will be switching **FROM** and **TO** (ie in the **appendix** at the back of this form)?
- Do all percentages (where applicable) add up to 100%?
- Have you read and understood the agreement and declaration in section **3**?
- Have you signed and dated the form where indicated?

Where to send this form

Mail or email this completed form (including the **appendix**) to:

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

Any questions?
133 731

Appendix

Switch investment options

Please read the following instructions before completing this section:

- You can switch using dollar amounts or percentages—you can't use a combination of both.
- **For MultiFund – Rollover, Super Bond or Trustee Bond:**
 - There is currently no fee for a switch.
 - You may invest in up to 10 investment options.
- **For Investment Linked and Flexible Income Pension:**
 - You may invest in one or more of the investment options listed for your plan.

What do you want to do?

- Switch **all** of your existing investments > Complete column **B** only (this column must total 100%).
- Switch **part** of your existing investments > Complete columns **A** and **B** (enter either \$ or %).

| Plans and available investment options | Code | Column A Switch FROM these options \$ or % | Column B Switch TO these options \$ or % |
|---|------|---|---|
| MultiFund Rollover (Tables: ULMD and ULMDN) MultiFund Super Bond (Tables: ULMB and ULMBN) MultiFund Trustee Bond (Table: ULMT) | | | |
| All Growth | DC | | |
| Australian Bond | DJ | | |
| Australian Bond ¹ | HF | | |
| Australian Share | DE | | |
| Balanced Growth | DV | | |
| Capital Guaranteed Fixed Interest ³ | DS | | |
| Conservative | DZ | | |
| High Growth ¹ | D9 | | |
| International Share | DI | | |
| Listed Property ² | DO | | |
| Moderate Growth | DF | | |
| Australian Share 5 | DL | | |
| Closed investment options | | | |
| Listed Property ^{1,3,4} | HP | | |

| Investment Linked Deferred Annuity and Personal Superannuation Bond – Superannuation (Tables: ULK, ULKN and ULASP) | | | |
|--|----|--|--|
| All Growth ² | C | | |
| Australian Share ² | E | | |
| Balanced Growth ² | V | | |
| Capital Guaranteed Fixed Interest ^{2,3} | S | | |
| Conservative ² | CS | | |
| International Share ² | I | | |
| Closed investment options | | | |
| Direct Property ^{2,4} | T | | |

| Plans and available investment options | Code | Column A Switch FROM these options \$ or % | Column B Switch TO these options \$ or % |
|---|-------------|---|---|
| Investment Linked Investment and Insurance Bonds and Personal Investment Plans – non-superannuation (Tables: ULASP, ULAN and ULNSP) | | | |
| Australian Share | J | | |
| Balanced Growth | M | | |
| Capital Guaranteed Fixed Interest ³ | S3 | | |
| Diversified Share | K | | |
| International Share | H | | |
| Moderate Growth | A3 | | |
| Closed investment options | | | |
| Cash Based ⁴ | W | | |

| | | | |
|---|-----------|--|--|
| Flexible Income Pension (Table: ULKP) | | | |
| Balanced Growth | AK | | |
| Capital Guaranteed Fixed Interest ³ | SK | | |
| Conservative | CK | | |

1 These options are only available for investors in the MultiFund Trustee Bond.

2 For Investment Linked Deferred Annuity, this amount excludes bonus units.

3 If you switch out of Capital Guaranteed Fixed Interest Option you will lose your guarantee. The unit price of your new investment option may go up or down.

4 This investment option is closed to new members—however, if you're already invested in this option, you may continue to contribute to it and include it in any switch requests. Once all funds have been withdrawn from this option you will no longer be able to access it.