

Membership form SuperLife superannuation scheme (AS/1068)

SuperLife number (SuperLife to complete)

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Use this form: To join a child up to SuperLife Limited's superannuation scheme as a Member of "myFutureFund".
 Send completed form to SuperLife Limited.

SL00101 – 23.06.2016

Privacy Act

This form collects information from you in connection with the Member's membership in SuperLife. This information is being received, collected and held by the Manager, SuperLife Limited, PO Box 105262, Auckland City 1143. The Manager may pass this information to SuperLife's trustee, administrators and advisers and other organisations as appropriate. You (while the Member is under age 18) and the child can see the information we hold, and correct this information, subject to the provisions of the Privacy Act 1993.

Your details

First names:	
Surname:	
Preferred name:	
Title (Mr, Mrs, Ms, Miss, Dr):	Male <input type="checkbox"/> Female <input type="checkbox"/>
Date of birth: / / (dd/mm/ccyy)	
Phone:	
Mobile:	
Email:	
Home address:	
Town/city:	Post code:
Postal address (if different):	
	Post code:

IRD number: The Member's IRD number must be entered. If the Member does not have one, you/they need to apply to the IRD for one.

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PIR ("Prescribed investor rate"):

10.5%	<input type="checkbox"/>	17.5%	<input type="checkbox"/>	28%	<input type="checkbox"/>
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Unless the Member earns more than \$14,000 a year, their PIR will be 10.5%. However, the default is 28% unless they advise us otherwise – see the PIR guide for more information.

myFutureFundGuardian's details

Under myFutureFund a person must be nominated to act as the "trustee" of the Member's myFutureFund Account until the Member is age 25. If the nominated person dies before the Member attains age 25, a guardian of the Member shall become the FutureFundGuardian as determined by the Trustee and if there is no guardian, the Trustee shall become the FutureFundGuardian.

First names:	Surname:		
Preferred name:	Title: (Mr, Mrs, Ms, Miss, Dr)	<input type="checkbox"/> Male	<input type="checkbox"/> Female
Date of birth: / / (dd/mm/ccyy)	Phone: ()		
Address:			
	Town/city:	Post code:	
Email:	Relationship to member:		

myFutureFundGuardian's details

Questions required under AML/CFT Act 2009

In the last 12 months:

1. Have you lived in any country other than New Zealand?

Yes ☐

No ☐

If Yes, please list the country(s):

2. Have you, any member of your immediate family, or any close business associate, been engaged in a role overseas that was, or is, related to political office or foreign public service?

Yes ☐

No ☐

Member's beneficiaries

On the death of the Member, any benefit will be paid to the individuals, or to their estate, or a family trust as nominated by the FutureFundGuardian. The FutureFundGuardian can change the nomination at any time by advice in writing to the Trustee.

If the Member dies, the SuperLife Trustee should pay the benefit, i.e. the myFutureFund Account balance, to (tick one):

☐ To the following people in the percentages shown:

Title (Mr, Mrs, Ms, Miss)	Name	Date of birth (dd/mm/ccyy)	Relationship	Savings account % share	Life insurance % share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total must be 100%				100%	100%

or ☐ The member's family trust. Enter name of trust:

or ☐ The member's estate

Complete sections 1, 2, 3, 4 and 5 as appropriate.

1. Regular savings amount

☐ I want to contribute regular savings of: \$ _____ each month.

☐ I have attached a direct debit authority form.

2. Initial lump sum amount (if any)

☐ I attach a cheque/have transferred by internet banking (12-3244-0039562-00), to make a lump sum contribution of \$ _____. Cheques should be payable to "SuperLife".

3. Investment strategy

Your savings are invested in the Default strategy, unless you choose differently from the range of options available.

- ☐ **Default strategy.** I want my Accounts invested in accordance with the Default strategy i.e. the AIM^{myFutureFund} option.
- or ☐ **Own strategy.** I want to choose my own investment strategy. If you choose the “own strategy” option, you can choose one of the standard investment strategies (details are in **myFutureFund investment statement**) or you can create your own investment strategy.

Options - Tick one option to make your investment choice.

Investment strategy options

Standard risk/return options

- ☐ 1. Cash
- ☐ 2. SuperLife³⁰
- ☐ 3. SuperLife⁶⁰
- ☐ 4. SuperLife⁸⁰

Designed for the investor wanting their account invested in the safety of “cash”

Designed for the investor wanting “conservative”, “balanced” or “growth”
The number e.g. 60 represents the percentage in shares and property

Targeted options

- ☐ 5. AIM^{Age Steps}
- ☐ 6. AIM^{First Home} / AIM^{myFutureFund}

Designed for the investor wanting a strategy where the risk automatically reduces as they get closer to retirement.

A “cash-plus” option for someone likely to withdraw money in the next few years and wants minimal risk of a negative 1-year return.

Ethical option

- ☐ 7. Ethica

A “balanced” socially responsible option.

Create your own strategy/portfolio

- ☐ 8. My Mix

If you tick “**My Mix**”, you must also enter the percentage you want to put in each of the individual Funds in “**My Mix strategy**” over the page.

Tick one box

4. My Mix strategy

If you ticked investment option 8 under section 3, i.e. “My Mix”, then you must complete this section, otherwise leave it blank.

		\$ or %	\$ or %
Managed Funds	SuperLife ^{Income}	<input type="text"/>	<input type="text"/>
	SuperLife ³⁰	<input type="text"/>	<input type="text"/>
	SuperLife ⁶⁰	<input type="text"/>	<input type="text"/>
	SuperLife ⁸⁰	<input type="text"/>	<input type="text"/>
	SuperLife ¹⁰⁰	<input type="text"/>	<input type="text"/>
	Ethica	<input type="text"/>	<input type="text"/>
Sector Funds	Cash	<input type="text"/>	<input type="text"/>
	NZ bonds	<input type="text"/>	<input type="text"/>
	OS bonds	<input type="text"/>	<input type="text"/>
	OS Non-govt bonds	<input type="text"/>	<input type="text"/>
	Property	<input type="text"/>	<input type="text"/>
	NZ shares	<input type="text"/>	<input type="text"/>
	Australian shares	<input type="text"/>	<input type="text"/>
	OS shares currency hedged	<input type="text"/>	<input type="text"/>
	OS shares (unhedged)	<input type="text"/>	<input type="text"/>
	Emerging markets	<input type="text"/>	<input type="text"/>
	UK Cash	<input type="text"/>	<input type="text"/>
	UK Income	<input type="text"/>	<input type="text"/>
	UK Shares/Property	<input type="text"/>	<input type="text"/>
ETF Funds	NZ Cash ETF	<input type="text"/>	<input type="text"/>
	NZ Bond ETF	<input type="text"/>	<input type="text"/>
	Global Bond ETF	<input type="text"/>	<input type="text"/>
	NZ Dividend ETF	<input type="text"/>	<input type="text"/>
	NZ 50 Portfolio ETF	<input type="text"/>	<input type="text"/>
	NZ Top 10 ETF	<input type="text"/>	<input type="text"/>

Auto rebalancing of My Mix

The standard practice is that your SuperLife Account balances will, from time to time, be rebalanced to maintain the overall strategy in line with your chosen investment strategy.

If you do **not want** to have the standard automatic rebalancing, and you have chosen the “My Mix” option, tick the box below. Otherwise, leave it blank. If you have chosen an investment strategy besides “My Mix”, the option not to have the auto rebalancing does not apply.

- ☐ I do **not want** auto rebalancing to apply to my Accounts of my chosen “My Mix” strategy.

NZ MidCap ETF		
NZ Property ETF		
Aust Top 20 Leaders ETF		
Aust Dividend ETF		
Aust Financials ETF		
Aust Property ETF		
Aust Resources ETF		
Aust MidCap ETF		
Total World ETF		
US S&P 500 ETF		
Europe ETF		
Asia Pacific ETF		
US Growth ETF		
US Value ETF		
US MidCap ETF		
US Small ETF		
Emerging Markets ETF		
Total		

Note: The Total if entered as "\$" must equal either the regular contribution or the initial lump sum. The Total if entered as "%" must equal 100%.

5. Purpose
 Enter the main purposes that the savings will be used for. This will be used by the Trustee as guidance for withdrawals, if the Trustee becomes the FutureFundGuardian should both you and the guardians of the Member die before the Member is age 25.

Identity and address verification

To meet the requirements under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009, we must verify your identity and residential address. We can try and do this electronically, but not everyone can be verified electronically. By completing the information below, you consent to us trying to verify your identity electronically.

Country of citizenship	<input type="text"/>	Vehicle Registration number (if applicable) Number plate. Only include the plate number if the vehicle is registered in your name.	<input type="text"/>
Complete details for at least one of the following:			
• NZ Drivers licence	<input type="text"/> NZ Drivers Licence number - The number is printed on your licence under the note '5a'	<input type="text"/> Card version - The version is printed on your licence under the note '5b'	
• NZ Passport	<input type="text"/> NZ Passport number - Make sure your name entered at the top of the form exactly matches the name shown on your passport, including middle name(s)	<input type="text"/> Passport expiry date	
• NZ Birth certificate	<input type="text"/> NZ Birth certificate number - Make sure the name entered at the top of the form is your current official name, including middle name(s)		
• NZ Citizenship	<input type="text"/> NZ citizenship number - Make sure the Country of birth, and your name entered above, exactly match the details shown on the Citizenship Certificate, including middle name(s)	<input type="text"/> Country of birth	

Agreement

I confirm that I have received an investment statement for myFutureFund for both me and the Member.

I apply to join the Member up to SuperLife.

I agree to be bound by SuperLife's trust deed and rules made by the Trustee from time to time.

I authorise SuperLife to direct debit the savings and associated fees (as applicable) from my bank account each month that I choose from time to time under SuperLife.

Signature (myFutureFundGuardian): _____ **Date:** ____/____/____ (dd/mm/ccyy)