

SuperLife KiwiSaver scheme application form

To apply to join the SuperLife KiwiSaver scheme (**SuperLife**), go to www.superlife.co.nz, or complete this application form and email it to us at superlife@superlife.co.nz or post it to us at PO Box 105262, Auckland 1143.

1. Personal details (Member)

First and middle names:

Surname:

Preferred name:

Title (Mr, Mrs, Ms, etc.):

Date of birth (dd/mm/yyyy):

Phone:

Mobile:

Email:

Home address:

Town/City:

Post code:

Postal address (if different):

Town/City:

Post code:

IRD number:

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Prescribed Investor Rate (**PIR**): (Tick one)

10.5% 17.5% 28%

To work out your PIR, go to www.ird.govt.nz/toii/pir

In the last 12 months, 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? (Tick one)

No

Yes – Country: _____



2. Savings

Employees

Complete this part if you are an employee

You can save at 3%, 4% or 8% of your gross (before tax) salary or wages through the PAYE system. If you want to save extra, please contact us for a direct debit form.

(Tick one) 3% (default) 4% 8%

My employer's details are (if you want to contribute in respect of other employers, please provide details separately):

Employer's name: _____
Employer's address: _____
Town/City: _____
Post code: _____

Non-employees

Complete this part if you are not an employee

You can save any recurring amount you specify and any one-off amounts. Your agreed recurring savings will be direct debited from your bank account each week or fortnight or month until you choose to stop them. If you want to make recurring savings, you must complete a direct debit form and return it with this application form. There are no minimum or maximum savings levels.

I want to save an initial sum of \$ _____
and I want to save \$ _____ each
(Tick one) Week Fortnight Month

3. Communications

Statement frequency: (Tick one) Monthly (default) Quarterly Annually (31 March) Weekly

4. Identity and address verification

To comply with anti-money laundering law, we must verify your identity and confirm your residential address. We can try to do this electronically, but not everyone can be verified electronically. By providing the information below, you consent to us trying to verify your identity and address electronically. If we are unable to do so, we will contact you for more information.

Country of citizenship	Vehicle number plate (if applicable)
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Only include the plate number if the vehicle is registered in your name.

Complete details for at least one of the following rows:

NZ drivers licence number	Card version
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The number is printed on your licence under the note '5a'

The version is printed on your licence under the note '5b'

NZ passport number	Expiry date
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Make sure your name entered on page 1 exactly matches the name shown on your passport, including middle name(s)

NZ birth certificate number

Make sure your name entered on page 1 is your current official name, including middle name(s)

NZ citizenship number	Country of birth
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Make sure the country of birth entered above, and your name entered on page 1, exactly match the details shown on the citizenship certificate, including middle name(s)



5. Investment strategy

Tick one investment strategy option

Investment strategy option

SuperLife^{Age Steps} SuperLife^{Age Steps} automatically sets the proportion of your investment in income and growth assets based on your age. As you get older, the proportion of your investment in more volatile growth assets will be reduced, lowering the expected size of the ups and downs in the value of your investment.

Cash

NZ Cash Fund Invests in New Zealand cash and cash equivalent assets, including term deposits. Designed for investors that want a defensive investment option that provides a return (after tax, fees and other expenses) that reflects the after-tax return on the New Zealand cash market.

Ethical fund

Ethica Invests in a mix of income and growth assets. Designed for investors that want a balanced investment option. A socially responsible fund which excludes assets that do not meet the fund's defined ethical investment standards.

Managed funds

SuperLife^{Income} Invests in income assets. Designed for investors that want an investment in New Zealand and international fixed interest.

SuperLife³⁰ Invests mostly in income assets. Designed for investors that want a conservative investment option.

SuperLife⁶⁰ Invests in a mix of income and growth assets. Designed for investors that want a balanced investment option.

SuperLife⁸⁰ Invests mostly in growth assets. Designed for investors that want a growth investment option.

SuperLife¹⁰⁰ Invests in growth assets. Designed for investors that want an aggressive investment option that invests in shares and property.

Set your own investment strategy

My Mix If you tick this option, please complete the My Mix investment strategy section on page 6.

6. Personal information

The information in this application form, and any information you provide us at later dates, will be collected, used, stored and disclosed as set out in our privacy policy at www.superlife.co.nz/legal/privacy-policy.

7. Member agreement

Do not complete this section if the member is under age 16

I confirm that I have received the SuperLife KiwiSaver scheme Product Disclosure Statement and apply to join SuperLife.

I authorise you to receive contributions from Inland Revenue for my KiwiSaver account and to contact my existing KiwiSaver provider (if any), providing personal information as necessary, to transfer all balances to my account. I understand that SuperLife will send me statements and other communications by email, unless I request that they be sent by post.

Member signature:

Date: (dd/mm/yyyy)



8. Financial adviser (if applicable)

Complete this section if you have a financial adviser and have agreed with the adviser that he/she will be paid a fee for providing you with financial advice

Financial adviser fee:

A 0.50%

B \$354

% per annum of your account balance or \$ per annum (complete the fee amount you have agreed with your adviser). The maximum financial adviser fee you can agree with your financial adviser is: (a) 0.50% per annum of your account balance; or (b) \$500 per annum.

Financial adviser details

Name:	Dylan Mann	Andrew Hamilton	Peter Fenwick
Company name:	The Advice Hub	The Advice Hub	The Advice Hub
Phone:	0800-806-806	0800-806-806	0800-806-806
Mobile:	0279369000	027 2433141	029 2220423
Email:	dylan@tah.co.nz	andrew@tah.co.nz	pete@tah.co.nz

I instruct you to charge me the financial adviser fee and pay it to my financial adviser. I authorise you to disclose information about me and my investments to my financial adviser (and his/her company). I understand that the financial adviser fee will be deducted from my account balance.

I will tell you if I want you to stop charging the financial adviser fee (for example, if I no longer use my financial adviser).

Member signature:

Date: (dd/mm/yyyy)

The financial adviser must be party to a Financial Adviser Fee Agreement with us.



9. Members under age 18 (if applicable)

Complete this section if the member is under age 18

Under age 16

If the member is under age 16, the member does not need to sign on page 3, but the member's guardian(s) must sign and provide their details below. If the member has joint guardians, both guardians must sign and provide details (even if the guardians are the member's parents and they have separated).

Age 16 or age 17

If the member is age 16 or 17, the member must sign on page 3 and any one of the member's guardians must sign and provide his/her details below.

I/We confirm that I/we have received the SuperLife KiwiSaver scheme Product Disclosure Statement and apply on behalf of the member to join SuperLife.

I/We confirm that I am/we are the legal guardian(s) of the member and provide evidence of my/our identity and of my/our guardianship status (for example, a copy of the member's birth certificate or a guardian statutory declaration form – you can obtain this form by calling 0800 27 87 37 or emailing superlife@superlife.co.nz).

1st Guardian signature:

2nd Guardian signature:
(if member under age 16)

Date: (dd/mm/yyyy)

Date: (dd/mm/yyyy)

Guardian(s) details

1st Guardian

First and middle names: _____

Surname: _____

Date of birth: (dd/mm/yyyy) _____

Phone: _____

Mobile: _____

Email: _____

Home address: _____

Town/City: _____

Post code _____

2nd Guardian (if member under age 16)

First and middle names: _____

Surname: _____

Date of birth: (dd/mm/yyyy) _____

Phone: _____

Mobile: _____

Email: _____

Home address: _____

Town/City: _____

Post code _____



10. My Mix investment strategy (if applicable)

Complete this section if you have ticked the 'set your own investment strategy' option on page 3

		Initial investment \$ or %	Future investment \$ or %	My Mix instructions
Ethical fund	Ethica			<p>Income</p> <p>Each fund receives income (for example, interest and dividends) as part of its overall investment return. Our standard practice is to automatically reinvest the income into the fund it came from. However, another option is to invest the income into the NZ Cash Fund – this may be a better option for you, particularly if you have reached age 65 and are making regular withdrawals from SuperLife.</p> <p>Tick one income option:</p> <p><input checked="" type="checkbox"/> I want each fund's income reinvested into the fund it came from (standard practice).</p> <p><input type="checkbox"/> I want each fund's income invested in the NZ Cash Fund.</p> <p>Rebalancing</p> <p>Over time, market movements will change the proportions of your investments so that they differ from the proportions you set in your My Mix investment strategy. The following options let you choose whether we rebalance your investments (i.e. move money between your funds) to maintain these proportions.</p> <p>Tick one rebalancing option:</p> <p><input checked="" type="checkbox"/> Option 1 – Standard rebalancing</p> <p>Our standard practice is to regularly rebalance your investments (normally each month) to maintain the proportions you set in your My Mix investment strategy.</p> <p><input type="checkbox"/> Option 2 – No rebalancing</p> <p>You can choose not to have your investments rebalanced. If you choose this option, the proportions of your investments will change with market movements.</p> <p><input type="checkbox"/> Option 3 – Regular withdrawal rebalancing</p> <p>This option is designed for investors that want to: (a) reduce the risk of withdrawing money from funds that invest in shares and property at a time when the value of those funds has fallen; and/or (b) maintain a minimum level of cash and/or fixed interest.</p> <p>If you choose this option, we will regularly rebalance your investments (normally each month) to maintain the proportions set in your My Mix investment strategy; however, we will only rebalance by moving money from higher volatility funds (for example, funds that invest in shares and property) to lower volatility funds (for example, funds that invest in fixed interest and cash), and will not move money the other way. This may be a better option for you, particularly if you have reached age 65 and are making regular withdrawals from SuperLife.</p>
Managed funds	SuperLife ^{Income}			
	SuperLife ³⁰			
	SuperLife ⁶⁰			
	SuperLife ⁸⁰			
	SuperLife ¹⁰⁰			
Sector funds	NZ Cash Fund			
	NZ Bonds Fund			
	Overseas Bonds Fund			
	Overseas Non-government Bonds Fund			
	Property Fund			
	NZ Shares Fund			
	Australian Shares Fund			
	Overseas Shares (Currency Hedged) Fund			
	Overseas Shares Fund			
	Emerging Markets Fund			
UK Cash Fund				
ETF funds	NZ Cash ETF Fund			
	NZ Bond ETF Fund			
	Global Bond ETF Fund			
	NZ Dividend ETF Fund			
	NZ Top 50 ETF Fund			
	NZ Top 10 ETF Fund			
	NZ Mid Cap ETF Fund			
	NZ Property ETF Fund			
	Australian Top 20 ETF Fund			
	Australian Dividend ETF Fund			
	Australian Financials ETF Fund			
	Australian Property ETF Fund			
	Australian Resources ETF Fund			
	Australian Mid Cap ETF Fund			
	Total World ETF Fund			
	US 500 ETF Fund			
	Europe ETF Fund			
	Asia Pacific ETF Fund			
	US Large Growth ETF Fund			
	US Large Value ETF Fund			
US Mid Cap ETF Fund				
US Small Cap ETF Fund				
Emerging Markets ETF Fund				

If you have entered \$ amounts in the initial investment and/or future investment column(s) above, they must add up to the initial savings amount and/or recurring savings amount specified in the savings section (on page 2). If you have entered % amounts, they must add up to 100%.

