

Did you know? You can change your investment options online at unisaver.co.nz

Personal and contact details

Mr Mrs Miss Ms Dr Assoc Prof Prof

Surname _____ Given names _____

Membership number _____ Date of birth (DD/MM/YYYY) _____

Email _____

Work phone _____ Home phone _____ Mobile _____

Select type of investment – choose one option

Option 1

I would like my contributions and employer contributions (if any) to be invested in UniSteps.

With UniSteps, the mix of growth and income assets changes automatically as you get older. Up until age 45, your savings are invested in 80% growth assets. From then, the percentage of growth assets is reduced gradually to 20% at age 69. UniSteps uses three investment options – Growth, Balanced and Conservative – to transition your savings from growth to income over time. See unisaver.co.nz for more information. You cannot mix and match between UniSteps and the other four options below.

Option 2

I would like my contributions and employer contributions (if any) to be invested in one or a combination of these options:

	Existing account balances	Future contributions
Growth	%	%
Balanced	%	%
Conservative	%	%
Cash	%	%
Total	100%	100%

- You can choose:
- a single option or combine them to create your own mix of growth and income assets
 - a different option for your existing account balances and for future contributions.

Declaration

I understand that:

- no switching fee is payable for the first change made during any year commencing on 1 January but that I will be charged a fee for the second and subsequent changes during that year (see unisaver.co.nz for a list of fees)
- it may take several business days for my choice of investment option(s) to be actioned
- a letter will be sent to me confirming that my request has been actioned.

Signed by MEMBER _____ Date DD/MM/YYYY _____

If you have any queries about completing this form, please call 0800 864 724 or email unisaver@mercercor.com.

Email this form to unisaver@mercercor.com

Alternatively, post the form to:

UniSaver New Zealand
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