

2. Change investment options

To UniSaver New Zealand, the trustee

DID YOU KNOW? You can make these changes online on unisaver.co.nz

Please use **BLOCK LETTERS** and read this form carefully before you start completing it.

Mr / Mrs / Miss / Ms / Dr / Assoc Prof / Prof.....
Circle one Surname Given names

Residential addressPostcode.....

Work phone.....Home phone.....Mobile.....

Email*..... Date of birth/...../..... Membership number

* By providing your email address you are consenting to receiving information about UniSaver (including the annual report and account statement) electronically. Should you no longer wish to receive such information electronically, or should your email address change, you undertake to advise UniSaver's administration manager by updating your personal details on unisaver.co.nz.

Choose either A or B from the following (Tick one):

A: 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 approximately 80% growth assets. From then, the percentage of growth assets is reduced gradually to approximately 20% at age 69. UniSteps uses three investment options - Growth, Balanced and Conservative (see below) to transition your savings from predominantly growth assets to predominantly income assets over time. See the booklet *Your Choices* or www.unisaver.co.nz for more information.

You cannot mix and match between UniSteps and the other four options below.

B: 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; and
- a different option for your existing account balances and for future contributions.

I understand that:

- no switching fee is payable for the first change made during any year commencing on 1 January, but that the second and subsequent changes during that year incur a \$50 fee
- my request will take place with effect from the first day of the month following the date this form is received by UniSaver's administrator, Mercer (N.Z.) Limited
- a letter will be sent to me confirming that my request has been actioned.

Signed.....Date.....

- Retain a copy of this form for your file.
- Send the original to:
UniSaver New Zealand
c/o Mercer (N.Z.) Limited
PO Box 1849
Wellington 6140