

**DID YOU KNOW?** You can change your investment options online at [unisaver.co.nz](http://unisaver.co.nz)

You can change your investment choice at any time. However, the change won't take effect until the beginning of the following month using the prior month's interest rate. Your new choice won't be listed straight away on the 'Investments' page when you sign in to your account. This won't happen until the interest rates are loaded for that prior month – usually about the 20th of the month following your request.

**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** – tick 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](http://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	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>

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](http://unisaver.co.nz) for a list of fees)
- my request will take place with effect from the first day of the month following the date this form is received by UniSaver's administration manager Mercer (N.Z.) Limited
- 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 800 864 724 or email [unisaver@mercero.com](mailto:unisaver@mercero.com).

**Scan and email** this form to [unisaver@mercero.com](mailto:unisaver@mercero.com)

**Alternatively, post** the form to:

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