

Member No:

Policy No:

### 1) Policy Owner(s) Details

#### Policy Owner 1

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	<input type="checkbox"/> Dr	Other	<input type="text"/>
Surname/Company/ Trust Name	<input type="text"/>						
Given name(s)	<input type="text"/>						
Date of birth	<input type="text" value="DD / MM / YY"/>			Contact number	<input type="text"/>		
If Company, ABN	<input type="text"/>						

#### Policy Owner 2

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	<input type="checkbox"/> Dr	Other	<input type="text"/>
Surname	<input type="text"/>						
Given name(s)	<input type="text"/>						
Date of birth	<input type="text" value="DD / MM / YY"/>			If Company, ABN	<input type="text"/>		

#### Contact Details

Unit no.	<input type="text"/>	Street no.	<input type="text"/>	Suburb	<input type="text"/>
Street name	<input type="text"/>			Country	<input type="text"/>
State	<input type="text"/>	Postcode	<input type="text"/>		
Home phone	<input type="text"/>				
Bus/Mobile	<input type="text"/>			Fax	<input type="text"/>
Email	<input type="text"/>				

### 2) Switch Request Details

What do you want to do? (tick the relevant box)

Full Switch

Partial Switch

No.	Investment Options	Fund Manager	From (% to \$ amount)	Fund Code (KI use only)	To (% to \$ amount)
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#### Part A1 Indexed Diversified

1	Conservative Indexed	Vanguard			
2	Balanced Indexed	Vanguard			
3	Growth Indexed	Vanguard			
4	High Growth Indexed	Vanguard			

#### Part A2 Indexed Sector Specific

5	Fixed Interest Indexed	Vanguard			
6	Australian Property Securities Indexed	Vanguard			
7	Australian Shares Indexed	Vanguard			
8	International Shares Indexed	Vanguard			

#### Part B Diversified

9	Conservative	Russell			
10	Balanced	Russell			
11	Growth	Russell			
12	High Growth	Russell			
13	Active Diversified Geared	MLC			

#### Part C Sector Specific

14	Australian Cash	Russell			
15	Term Deposit	KeyInvest			
16	Active Cash	Smarter Money			
17	Fixed Interest	Schroder			
18	Australian Property Securities	MLC			
19	Infrastructure	Magellan			
20	Australian Shares	Fidelity			
21	Australian Shares Multi	Russell			
22	Australian Shares Value	Investors Mutual			
23	Australian Shares Industrial	Investors Mutual			
24	Australian International Shares Long-Short	Watermark			
25	Australian Shares Geared	Perpetual			
26	International Shares Multi	Russell			
27	International Shares	Magellan			

**Total Life Events Bond:** \$

Do you wish to change your regular savings plan in line with this transaction?  Yes  No

### 3) Declaration

I/we the policy owner(s), whose signature(s) appear below, hereby understand/acknowledge and agree as follows:

- My/our decision in relation to this product is based on the material received, including the PDS which I/we have received, read and understood.
- I/We agree to be bound by the terms of my/our Policy.
- In the event of any inconsistency between the terms of my/our Policy and the information contained in the PDS, the terms of the policy will prevail.
- I/We accept that KeyInvest may send me/us information about its products or services from time to time.

I/We understand that I/we may notify you of my/our decision not to receive further information by contacting KeyInvest directly.

- I/We acknowledge that funds will be switched as per my/our instructions above as at the date of acceptance of this form by KeyInvest.
- I/We acknowledge that the performance of an investment fund is not guaranteed by KeyInvest Ltd
- I/We consent to the collection, use, storage and disclosure of my personal information as described in KeyInvests Privacy Policy which is available at [keyinvest.com.au](http://keyinvest.com.au), or by calling KeyInvest.
- I/We acknowledge that for the Life Events Bond, the unit price used to purchase units will be the unit price effective the day that KeyInvest receives the completed additional investment form. Forms received after 2:00PM CST on a Tuesday will be processed using the following days unit price.

Signature of Policy Owner 1

Date

Signature of Policy Owner 2

Date

### 4) Contact Details

**Street Address:** KeyInvest  
Level 5, 49 Gawler Place  
Adelaide SA 5000

**Postal Address:** KeyInvest  
PO Box 3340  
Rundle Mall SA 5000

**Phone:** 1300 658 904  
**Email:** [info@keyinvest.com.au](mailto:info@keyinvest.com.au)  
**Web:** [www.keyinvest.com.au](http://www.keyinvest.com.au)  
**Hours of Operation:** 8.30am - 5.00pm (CST)

#### OFFICE USE ONLY

Policy Owner/Member details and signature verified:

Processing of form complete

Date