



# Life Events Bond Switch and Auto-Rebalance Form

Use this form to either switch between Investment Options or to set up or cancel your Auto-rebalancing facility.

Member Number Policy Number

## 1. Policy Owner(s) Details

### Policy Owner 1

Title Mr Mrs Ms Miss Dr Other  
 Surname/Company/  
Trust Name  
 Given Names  
 Date of Birth If Company, ABN  
 Unit Number Street No  
 Street Name Suburb  
 State Postcode Country  
 Home Phone Fax  
 Mobile Email

### Policy Owner 2

Title Mr Mrs Ms Miss Dr Other  
 Surname/Company/  
Trust Name  
 Given Names  
 Date of Birth If Company, ABN  
 Unit Number Street No  
 Street Name Suburb  
 State Postcode Country  
 Home Phone Fax  
 Mobile Email

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## 2. Switch Request Details

What do you want to do?

**Full Switch**

**Partial Switch**

Note the minimum switch per Investment Option is \$100.

Please complete the details below and ensure the total switch 'From' and 'To' totals either 100% or the sum of \$ switched.

Do you wish to change your regular savings plan in line with this transaction?

Yes

No

Do you wish to change your regular withdrawal plan in line with this transaction?

Yes

No

Do you want the Investment allocation selected in Section 2, to be your default allocation for all future contributions that are to be invested?

Yes

No

**Important:**

If you do not make a selection or the provided allocation percentage does not total 100%, your Default Investment Allocation will not be updated.

Please note: If a Dollar Cost averaging facility or Auto-rebalancing facility is already established on your account, completing Part 2 will also update the existing allocation strategies for these features on your account.

Investment Options	UFM	Fund Code (KI use only)	From (Amount in either \$ or %)	To (Amount in either \$ or %)	Default Investment Allocation
<b>Part A Indexed Diversified</b>					
Conservative Index	Vanguard	LEB1			%
Balanced Index	Vanguard	LEB2			%
Growth Index	Vanguard	LEB3			%
High Growth Index	Vanguard	LEB4			%
<b>Part B Indexed Sector</b>					
Australian Fixed Interest Index	Vanguard	LEB5			%
Australian Property Securities Index	Vanguard	LEB6			%
Australian Shares Index	Vanguard	LEB7			%
International Shares Index	Vanguard	LEB8			%
iShares Australian Bond Index	BlackRock	LEB28			%
iShares Australian Equity Index	BlackRock	LEB29			%
iShares Australian Listed Property Index	BlackRock	LEB30			%
iShares International Equity Index	BlackRock	LEB31			%
iShares Hedged International Equity Index	BlackRock	LEB32			%

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Investment Options	UFM	Fund Code (KI use only)	From (Amount in either \$ or %)	To (Amount in either \$ or %)	Default Investment Allocation
<b>Part C Diversified</b>					
* Wholesale Inflation Plus – Assertive Portfolio	MLC*	LEB13*			%
Conservative – Class A	Russell	LEB9			%
Balanced – Class A	Russell	LEB10			%
Growth – Class A	Russell	LEB11			%
High Growth – Class A	Russell	LEB12			%
<b>Part D Sector Specific</b>					
<b>Cash and Fixed Interest</b>					
Real Outcome	Ardea	LEB35			%
* Smarter Money – Institutional Class A	Coolabah*	LEB16*			%
Term Deposits	KeyInvest	LEB15			%
Short Term Income Securities	Pendal	LEB34			%
Diversified Fixed Interest	PIMCO	LEB36			%
* Australian Cash – Class A	Russell*	LEB14*			%
* Fixed Income	Schroder*	LEB17*			%
Cash **	UBS	LEB33			%
<b>Australian Equities</b>					
Managed Volatility Equities	AllianceBernstein	LEB38			%
Australian Equities	Fidelity	LEB20			%
Broadcap	Greencape	LEB39			%
Australian Share	Investors Mutual	LEB22			%
All Industrials Share	Investors Mutual	LEB23			%
Wholesale Geared Australian Share	Perpetual	LEB25			%
* Australian Shares – Class A	Russell*	LEB21*			%
<b>Property and Infrastructure</b>					
Infrastructure	Magellan	LEB19			%
Real Income – Class A	Martin Currie	LEB37			%
<b>Global Equities</b>					
Global - Open Class	Magellan	LEB27			%
* International Shares – Class A	Russell*	LEB26*			%
Global Equity – I Class	T Rowe Price	LEB42			%
Quality Global Growth (Managed Fund)	WCM	LEB41			%
<b>Part E SRI/ESG</b>					
Sustainable Share Fund	Alphinity	LEB43			%
Diversified ESG Stable	BlackRock	LEB44			%
<b>Total Switch % or amount</b>					%

\* Closed to new investors

\*\* Current default Cash Investment Option for progressive investing.  
Check the KeyInvest website for any updates.

\*\*\* Please ensure the 'Switch To' allocation column totals 100% or the sum of dollar amounts switched.

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## 3. Auto-rebalancing service instructions

Complete this section if you want to add or remove the Auto-rebalancing facility.

**I authorise KeyInvest to take the following action:**

**Add the Auto-rebalancing service**       **Remove the Auto Rebalance**

If you wish to add a new Auto-rebalance instruction, complete the Default Investment Allocation % column in Part 2.

If you do not have a Financial Adviser and you opt to use this feature, auto-rebalancing will maintain your default investment allocation so that your investment strategy remains aligned with your risk profile.

When electing to use auto-rebalancing, you authorise KeyInvest to automatically switch such amounts on the annual rebalance date, from one Investment Option to another Investment Option as is required to maintain your default investment allocation within 1% of the nominated default investment allocation range.

Please note: If you select the annual Auto-rebalance service, your portfolio will be rebalanced annually on your anniversary date, to align with your 'default Investment allocation' nominated in Section 2. Refer to the KeyInvest PDS for our terms and conditions.

**Important:**

**If you are using the KeyInvest Progressive Investing feature at the time of the scheduled annual Auto-rebalancing, your annual Auto-rebalance will not occur.**

## 4. Declaration and signatures

- I/we declare that all details in this form are true and correct.
- I/We authorise KeyInvest to process the instructions set out in this form.
- I/We acknowledge that the processing of my/our instructions may be delayed if the form is incomplete.
- I/We confirm that I/We have received a copy of the current Product Disclosure Statement (PDS), have read, understood the PDS, and agree to be bound by the terms and conditions set out in the PDS.
- If this form is signed under Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that power.
- If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the Anti-Money Laundering and Counter- Terrorism Financing Act 2006.

**Signature of Investor 1**

**Signature of Investor 2**

Full Name

Full Name

Date

Date

Please select the appropriate box:

Individual

Trustee

Individual

Trustee

Director

Power of Attorney

Director

Power of Attorney

# Life Events Bond Switch and Auto-Rebalance Form

## Contact Details

**Street Address:**

KeyInvest  
Level 5, 49 Gawler Place  
Adelaide SA 5000

**Postal Address:**

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Rundle Mall SA 5000

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**Web** [www.keyinvest.com.au](http://www.keyinvest.com.au)

**Hours** 8.30am – 5.00pm (CST)