

KeyInvest Investment Bonds

Life Events Switch Request Form



Use this form to switch between the Life Events Bond investment options.
Please return the completed form to KeyInvest Ltd (KeyInvest) or phone KeyInvest on 1300 658 904.

Member No:

Policy No:

1) POLICY OWNER(S) DETAILS

Policy Owner 1

Title Mr Mrs Ms Miss Dr Other

Surname/Company/
Trust Name

Given name(s)

Date of birth If Company, ABN

Policy Owner 2

Title Mr Mrs Ms Miss Dr Other

Surname/Company/
Trust Name

Given name(s)

Date of birth If Company, ABN

Contact Details

Unit no. Street No.

Street name Suburb

State Postcode Country

Home Phone

Bus/Mobile Fax

Email

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2) SWITCH REQUEST DETAILS

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

<input checked="" type="checkbox"/>	Full or partial Switch	Complete Column A <ul style="list-style-type: none"> Insert the new % allocation that will apply to your current balance (this column must equal 100%). If you wish to switch a specific dollar amount please contact KeyInvest on 1300 658 904
<input checked="" type="checkbox"/>	Change how your Regular Savings Plan (RSP) is invested	Complete Column B <ul style="list-style-type: none"> Insert the new % allocation or \$ amount that will apply to your current RSP amount. If you wish to change the overall total RSP amount you will need to complete a change of details form available on our website www.keyinvest.com.au.

No.	Investment Option	Fund Manager	Column A (% only)	Fund Code KI use only	Column B - to (% or \$ amount)
PART A1 - INDEXED DIVERSIFIED					
1	Conservative indexed	Vanguard		11	
2	Balanced indexed	Vanguard		12	
3	Growth indexed	Vanguard		13	
4	High growth indexed	Vanguard		14	
PART A2 - INDEXED SECTOR					
5	Fixed interest indexed	Vanguard		15	
6	Australian property securities indexed	Vanguard		16	
7	Australian shares indexed	Vanguard		02	
8	International shares indexed	Vanguard		17	
PART B - DIVERSIFIED					
9	Conservative	Russell		10	
10	Balanced	Russell		04	
11	Growth	Russell		05	
12	High growth	Russell		06	
13	Active diversified geared	MLC		18	
PART C - SECTOR SPECIFIC					
14	Australian cash	Russell		09	
15	Term deposit	KeyInvest		01	
16	Active cash	Smarter Money		19	
17	Fixed interest	Schroder		20	
18	Australian property securities	MLC		21	
19	Infrastructure	Magellan		22	
20	Australian shares	Fidelity		23	
21	Australian shares multi	Russell		07	
22	Australian shares value	Investors Mutual		24	
23	Australian shares industrial	Investors Mutual		25	
24	Australian/International shares long-short	Watermark		26	
25	Australian shares geared	Perpetual		27	
26	International shares multi	Russell		08	
27	International shares	Magellan		28	
TOTAL			100%		

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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, or by calling KeyInvest.

Signature of Policy Owner 1

Signature of Policy Owner 2

Date

DD / MM / YY

Date

DD / MM / YY

Company Seal
(if applicable)



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
Web: 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:

DD / MM / YY