

Switch request

Information sheet

Use this form to switch your funds between investment options in your Resolution Growth Bond investment account.

Privacy and your personal information

We're committed to making sure that the personal information you provide to us remains secure, is only used for the purposes for which it's collected and that you're aware of what information is held and your rights.

We collect your personal, and in some circumstances, your sensitive information (eg your identity, contact details, age, gender and financial information), from you directly or from those authorised by you (eg family members, financial advisers, your employer, other insurers), as well as others we consider necessary including our partners, associates, government entities or service providers.

The information we collect is used to enable us to provide our products and services including to process and settle claims and complaints, verify your identity, make offers of products and services provided by us, and conduct market or customer research to determine those products or services that may suit you.

The types of information we collect will depend on your relationship with us and we'll only collect your personal information where we are required to or as authorised under various laws including privacy and data collection, financial services, superannuation, taxation and anti-money laundering and counter-terrorism financing laws.

We may disclose your personal and sensitive information to others with whom we have business arrangements for the purposes listed above and may include our trustee, insurers, reinsurers, service providers we engage to provide us with services, advisers, or where the disclosure is required to government, law enforcement, dispute resolution, statutory or regulatory bodies. Some of these third parties may be located outside the country of collection such as India, Taiwan, United Kingdom, and the United States of America.

When you provide personal information about other individuals, we rely on you to have made them aware that you are providing the information to us, how they can access it and all other matters described in this privacy notice. We rely on you to have obtained their consent on these matters.

You can seek access to and correct your personal information by contacting us. You can't access or correct personal information of others unless you've been authorised by them or are authorised under law or they're your dependants.

If you don't agree with the above or provide us with your personal and sensitive information as required, we may not be able to provide you with our products or services.

For more information about our handling of personal and sensitive information, including further details about access, correction, and complaints please read our **privacy policy** by visiting resolutionlife.com.au/privacy or by contacting us on 133 731.

Issue date: 28 February 2022
Resolution Life Australasia Limited ABN 84 079 300 379

This page has been left blank intentionally.

Please keep this information sheet for your records—
don't return it with your completed form(s).

Switch request

Use this form to switch your funds between investment options in your Resolution Growth Bond investment account.

Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

1. Investment account details

Investment number

Product

Owner 1

Title

Date of birth

Surname

Given name(s)

Residential address

Suburb

State

Postcode

Contact phone number

Mobile number

Email

Address for communications

Please cross if same as residential address.

Address

Suburb

State

Postcode

1. Investment account details (continued)

Owner 2 (if applicable)

Title

Date of birth

Surname

Given name(s)

Residential address

Suburb

State

Postcode

Contact phone number

Mobile number

Email

Address for communications

Please cross if same as residential address.

Address

Suburb

State

Postcode

2. Investment option selection

Please read the following instructions before completing this section:

- You should consider the current investment objectives, strategies and risk profile of an investment before you switch.
- We may delay a switch due to delays by investment managers (eg the investment manager may delay issuing a unit price or the manager delays or suspends transactions). The delays could be for weeks, months or even years.
- You can choose to invest in one or more (up to 9) investment options at any time.
- The minimum switch amount is \$250.

What do you want to do?

- Switch your existing investments > Complete column **B** only (this column must total 100%).
- Switch part of your existing investments (i) > Complete columns **A** and **B** (enter either \$ or %).
- Change how your future contributions will be invested(ii) > Complete column **C**.

(i) If you're switching part of your existing investments using dollar amounts, the **Total \$ switch amount** for **Column A** and **Column B** must be equal.

(ii) Only complete **Column C** if your future investment profile is different to your current investment profile.

Investment levels and options	Code	Switch FROM these options (Column A) \$ or %	Switch TO these options (Column B) \$ or %	Future profile (Column C) %
Diversified investment options				
Resolution All Growth	GADS			
Resolution Balanced Growth	GABG			
Resolution Moderate Growth	GAMG			
Future Directions Balanced	GAFD			
Single-sector investment options				
Resolution Australian Bond	GAAB			
Resolution Cash Plus ¹	GACF			
Specialist Australian Share	GAFS			
Specialist Property and Infrastructure	GFDP			
Total \$ switch amount (if applicable)				

¹ If you switch out of the Resolution Cash Plus option, you'll lose your guarantee. The unit price of your new investment option may go up or down.

3. Acknowledgement and declaration

- I/We have read and understood the privacy and your personal information section in the attached **information sheet**.
- I/We declare that I/we have received and been given the opportunity to read the Resolution Growth Bond **product disclosure statement (PDS)**, and have considered advice from my/our financial adviser (if applicable).
- I/We understand the risk and effects of my/our investment choices.
- I/We declare that I/we direct Resolution Life to complete the switch instructions in section **2**.
- I/We understand that once this request has been submitted it cannot be cancelled.
- I/We understand that Resolution Life will use the unit price next calculated where all relevant information is received at an Resolution Life processing centre by 3pm Sydney time. If all relevant information is received after 3pm Sydney time, the request will be treated as if it was received the next Sydney business day.
- If this form is incorrectly completed, I/we understand Resolution Life can't process the requested changes.
- I/We acknowledge that I/we may not have received the most recent Resolution Growth Bond **PDS** or any notices about the investment options selected.
- I/We declare that all the details in this form are true and correct.
- If you're signing under power of attorney, you verify that, at the time of signing, you had not received notice of revocation of that power of attorney. In the event that a certified copy of the power of attorney has not been previously provided, you must submit this with the completed form.
- Where any owner is under the age of 16, consent of a parent/guardian is required.
- If you're signing as a trustee, you warrant that, at the time of signing, you are authorised under the relevant trust deed to apply and to do all things necessary as a result of becoming an investment owner.

Signature of owner 1

X

Date

D D M M Y Y Y Y

Signature of owner 2 (if applicable)

X

Date

D D M M Y Y Y Y

Where to send this form

Email or Mail this completed form to:

Resolution Life
Customer Service
GPO Box 5441
Sydney NSW 2001
askus@resolutionlife.com.au

Any questions?
133 731