FUTURITY

Default Investment Allocation, Switch and Reweight Form

This form is to be used for the following.

- **Reweight your entire Investment Option holdings within your bond.**
- **Partially switch between Investment Options within your bond.**
- **Update the Default Investment Allocation for your bond.**
- **Set up or cancel the auto-reweight facility for your bond.**

Minimum switching amounts of $100 per switch transaction apply, with the minimum balance remaining in an Investment Option after a switch has been completed to be $500.

Section 1 – Bond Owner details

Client number(s):	CL5	Bond number:	
	CL5		
Bond Owner(s):			
Email:			
Phone:			

Section 2 – Instruction type

Please select all the instruction types you wish to provide.

☐ Full bond reweight – reweight my entire Investment Option holdings	▶ **Please complete Section 3.**
☐ Partial switch – switch part of my Investment Option holdings	▶ **Please complete Section 4.**
☐ Set up or cancel the auto-reweight facility	▶ **Please complete Section 5.**
☐ Update my Default Investment Allocation to direct how future contributions are invested	▶ **Please complete Section 6.**

Important: Reweighting or switching your portfolio (Sections 3 and 4) will not change your Default Investment Allocation which is used for future contributions, ongoing Regular Savings Plan contributions, the dollar cost averaging facility and the auto-reweight facility. If you wish to update your Default Investment Allocation, please complete Section 6.

You can view your Default Investment Allocation by logging in to your online portal.

Section 3 – Full bond reweight instruction

Complete this section if you want a total reweight of the entire Investment Option holdings in your bond.

Please reweight the Investment Options in my bond according to:

☐ the current Default Investment Allocation in my bond.

OR

☐ the investment allocation I provide below.

Important: If you want to update your Default Investment Allocation for future contributions to the investment allocation provided below, please also complete Section 6.

Investment Option	Futurity Code	Allocation (%)
Total allocation percentage must total 100%		100%

Important: There may be a delay in processing your request if the total allocation does not equal 100%.

Please attach extra copies of this page if you need to provide more Investment Options than the space provided.

Section 4 – Partial switch instructions

Complete this section if you want to switch part of your Investment Option holdings.

There are examples provided at the end of the form as a guide to providing partial switch instructions. Partial switch instructions provided incorrectly will require clarification and result in processing delays.

Please switch the Investment Options in my bond according to the instructions provided below:

Important: If you want to update your Default Investment Allocation for future contributions, please also complete Section 6.

Switch % or $ FROM the selected Investment Option

Investment Option	Futurity Code	Allocation (% or $ – Please indicate)
Total allocation (for $ allocation only)		

Continued on next page ▶

Switch % or $ TO the selected Investment Option

Investment Option	Futurity Code	Allocation (% or $ – Please indicate)
Total allocation (% or $)		

Important:

For percentage allocation, the 'Switch % or $ TO' allocation column must total 100%

For dollar amount allocation, the total in the 'Switch % or $ FROM' allocation column must equal the total in the 'Switch % or $ TO' allocation column.

Please attach extra copies of this page if you need to provide more Investment Options than the space provided.

Section 5 – Auto-reweight facility instructions

Complete this section if you want to set up or cancel the auto-reweight facility.

Auto-reweight will perform switches on the bond to return the Investment Option holdings to the Default Investment Allocation at a frequency of your choosing. Refer to the current Product Disclosure Statement for terms and conditions.

If you want your Investment Option holdings automatically reweighted back to the Default Investment Allocation for your bond, please select your preferred auto-reweight frequency below.

☐ Quarterly ☐ Half-yearly ☐ Yearly

Auto-reweight effective starting month: MM / YYYY

The auto-reweight starting month cannot be the current month. Please select a starting month that is after the current month.

Auto-reweight is actioned on the 25th day of the month in accordance with the selected frequency and auto-reweight effective starting month, or the next Melbourne Business Day if the date falls on a weekend or public holiday.

Important: If there is an active dollar cost averaging facility currently on your bond, auto-reweight cannot be activated, and this instruction will not be processed. You will need to submit a new instruction after the completion of the dollar cost averaging facility.

☐ Please make a selection here if you want to cancel an existing auto-reweight facility on your bond.

Section 6 – Default Investment Allocation

Complete this section if you want to update your Default Investment Allocation.

The Default Investment Allocation serves as the primary instruction for future additional contributions, whether they are made via a Regular Savings Plan or ad-hoc additional contributions. Furthermore, the Default Investment Allocation will be used for the auto-reweight and dollar cost averaging facilities.

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.

Important: If a Regular Savings Plan, dollar cost averaging facility or auto-reweight facility is currently active on your bond, completing Section 6 will also update the existing allocation strategies for these facilities on your bond.

All future contributions are to be invested as follows:

☐ According to the investment allocation provided in Section 3.
(This option is only available if you have also requested a full bond reweight in Section 3.)

OR

☐ According to the instructions in the following table.
(If you have more Investment Options, please attach a separate list.)

Continued on next page ▶

Investment Option	Futurity Code	Allocation (%)
	Allocation percentage must total 100%	100%

Section 7 – Declaration and signature

I/We confirm that, to the best of my/our knowledge, the information provided on this form is true and correct.

I/We authorise Futurity Investment Group Limited to act on and process the instructions set out in this form*.

I/We confirm that I/we have obtained a copy of the current combined Financial Services Guide and Product Disclosure Statement, have read and understood it and agree to be bound by the terms and conditions contained within the document.

Bond Owner / Director / Trustee 1		**Bond Owner / Director / Trustee 2**	
Signature:		Signature:	
Print name:		Print name:	
Capacity:		Capacity:	
Date:	/ /	Date:	/ /

* By completing this form as Bond Guardian/Bond Representative, you are acting in capacity as Bond Owner and confirm that you are authorised to do so.

To submit your completed form, please log into your online portal and use the document upload function to securely share this document with us.

Partial switch instruction examples

Please use the following examples as a guide to complete your partial switch instructions.

Partial switch instructions in any format not in the following guide may require clarification and result in processing delays.

Switches by percentage example

Switch 30% of my investment in Investment Option A, 60% of my invest in Investment Option B, and 100% of my investment in Investment Option C into Investment Options D and E. Of the total value of proceeds from these investments, invest (switch) 70% into Investment Option D and 30% into Investment Option E.

Switch FROM			▶ Switch TO		
Investment Option name	Code	Allocation %	Investment Option name	Code	Allocation %
Investment Option A	AA1	30%	Investment Option D	DD4	70%
Investment Option B	BB2	60%	Investment Option E	EE5	30%
Investment Option C	CC3	100%			
Total		Not required	Total **(must total 100%)**		100%

Switches by dollar amount example

Switch $20,000 of my investment in Investment Option A and $15,000 of my investment in Investment Option B into Investment Options C, D and E. Of the total value of proceeds from these investments, invest (switch) $15,000 into Investment Option C, $10,000 into Investment Option D and $10,000 into Investment Option E.

Switch FROM			▶ Switch TO		
Investment Option name	Code	Allocation $	Investment Option name	Code	Allocation $
Investment Option A	AA1	$20,000	Investment Option C	CC3	$15,000
Investment Option B	BB2	$15,000	Investment Option D	DD4	$10,000
			Investment Option E	EE5	$10,000
Total (must match Switch TO total)		$35,000	Total **(must match Switch FROM total)**		$35,000

Combination switch example (Switch FROM dollar amount and Switch TO percentage)

Switch $30,000 of my investment in Investment Option A and $20,000 of my investment in Investment Option B into Investment Options C, D and E. Of the total value of proceeds these investments, invest (switch) 30% into Investment Option C, 40% into Investment Option D and 30% into Investment Option E.

Switch FROM			▶ Switch TO		
Investment Option name	Code	Allocation $	Investment Option name	Code	Allocation %
Investment Option A	AA1	$30,000	Investment Option C	CC3	30%
Investment Option B	BB2	$20,000	Investment Option D	DD4	40%
			Investment Option E	EE5	30%
Total		Not required	Total **(must total 100%)**		100%

Combination switch example (Switch FROM percentage and Switch TO dollar amount)

This switch combination is not possible.

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