



Investment portfolio alteration advice.

Policy number

I wish to change my investment portfolio, i.e. the percentage of my regular contribution to be invested in each of the investment portfolios.

Please change my allocation to that shown below - maximum up to 4 options:

Cash portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Conservative portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Balanced portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Growth portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
New Zealand/Australian shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
International share portfolio	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Total	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

Customer(s) acknowledgement.

I/we acknowledge and confirm the following:

1. I/we are authorised to make this new investment allocation in the selected portfolio(s).
2. Fidelity Life Assurance Company Limited recommends that I/we consult with my/our financial adviser on the investment choices or allocations selected to help ensure that my/our choices are suitable for my/our current investment needs and risk appetite.
3. I/we understand that any change requested will be implemented as soon as practicable after receipt of this form.
4. I/we understand that the value of my/our investments upon withdrawal in one portfolio and reinvestment into another portfolio is based on the unit price which applies when the transaction is processed and portfolio values may fluctuate.

Policy owner (please print)

Policy owner signature

Date:

Email address

Phone number

Policy owner (please print)

Policy owner signature

Date:

Email address

Phone number

Privacy Act 2020

This form collects personal information that will be used to change the investment portfolio allocation and update your contact details. The way we collect, use, disclose and store your personal information is set out in our privacy statement which is available at fidelitylife.co.nz.

Please return your completed form to:

© customerservice@fidelitylife.co.nz ✉ Freepost 1893, PO Box 37275, Parnell, Auckland 1151