



## Contents and instructions

Please complete this form if you wish to inform us of changes to your current standing instructions.

### Step 1: Client details

Complete the name in which the investment is held, including client reference number.

### Step 2: Alteration to standing instructions

Please complete this section to make changes to your current standing instructions.

Note that if an existing Auto-rebalance arrangement is in place, rebalancing of account investments will continue in accordance with your new standing purchase instructions.

### Purchase instructions

Simply nominate a percentage allocation to your selected investment options.

### Sell instructions

You may choose from one of the following methods:

**Method A** – units to be sold based on a nominated percentage from your selected investment options.

**Method B** – units to be sold proportionally based on the value of your investment option(s) as at the time of the sale.

**Method C** – units to be sold from your investment options in your nominated order.

### Step 3: Auto-rebalancing options

Use this section if you would like to either:

- activate the Auto-rebalance facility to have your portfolio rebalanced in line with your standing purchase instructions (indicate the frequency and commencement month), or
- cancel the Auto-rebalance facility (if applicable).

### Step 4: Declaration and signature

You must sign and date the form before submitting.

### Step 5: Financial adviser use only

Your financial adviser should complete their name and adviser number.

Once completed, please send this form to:

Summit Service  
GPO Box 2754  
MELBOURNE VIC 3001

If you have the Generations fax facility, this form can be faxed to Summit on 1800 780 081.

## Step 1: Client details

Client name

 -  - 

Client reference number (eg 0012345-L2-01)

## Step 2: Alteration to standing instructions

**Standing purchase instructions** – Simply nominate a percentage allocation against your selected investment options.

Please tick the following box below if you wish to disable the standing purchase instructions:

I wish to temporarily disable my standing purchase instructions. (Note: Maximum of 4 weeks allowed from the date of disabling standing purchases. The standing purchases will then be re-enabled).

**Standing sell instructions** – you may choose from one of the following methods:

**Method A** – units to be sold based on a nominated percentage from your selected investment options.

**Method B** – units to be sold proportionally based on the value of your investment option(s) as at the time of the sale.

**Method C** – units to be sold from investment options in your nominated order.

**Standing sell instructions**  
(complete only one option)

**Method A**  
Standing sell percentage

**Method B**  
Proportional percentage of your portfolio

**Method C**  
Sell hierarchy

Investment name	Product number	Standing purchase percentage	Please nominate your required percentage	If you select Method B the percentage will be calculated at the time of selling units	Please nominate your required order: 1 being the first investment option to be sold
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		%	%		
		<b>100%</b>	<b>100%</b>		

For a list of current investments, please refer to the latest Generations Investment Options PDS on [www.summitservice.com.au](http://www.summitservice.com.au).

## Step 3: Auto-rebalancing options

Would you like to enable the Auto-rebalancing facility?

No  Yes Frequency:  Half-yearly  Yearly Commencement month

Note: The first Auto-rebalance will occur on the 15th of the commencement month.

Would you like to cancel the Auto-rebalancing facility?  Yes  No

Auto-rebalance will be conducted between the 15th and the 25th of the month nominated. If unsuccessful, the rebalance will default to the next half-yearly or yearly interval as selected.

## Step 4: Declaration and signature

I/We acknowledge that neither NMMT Limited, nor any member of the Global AXA Group guarantees the performance of the investments that have been chosen, and does not express any opinion as to the appropriateness of any particular investment in relation to the individual circumstances of any member.

I/We acknowledge that where I/we have invested in a illiquid investment option, any withdrawal or transfer which required the sale of all or part of this investment may be processed in a period larger than 30 days.

I/We confirm that I/we have relied on our own investigations and the advice of my/our financial adviser in choosing the investments.

I/We have been provided with a current Generations Investment Options PDS and any supplementary information on the underlying investments and a written recommendation by my/our financial adviser. I/We therefore ask that Summit actions this request.

Client one signature  Date

Client two signature  Date

## Step 5: Financial adviser use only

Adviser name  -   -