

Contents and instructions

Complete this form to switch all or part of your Generations portfolio between investment options.

Step 1: Client details

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

Step 2: Managed Funds sales

Please complete the name of the investment option(s) that you wish to switch FROM and enter either a dollar amount or a full sell.

If you are switching more than 95 per cent of a particular investment(s), that investment(s) will be sold in full.

Note the following minimums:

- Total minimum switch amount is \$500 (excluding auto-rebalancing).
- Minimum sale amount per investment option is \$50.
- Minimum balance per investment option is \$500.

Step 3: Managed Funds purchases

Please complete the name of the investment option(s) that you wish to switch TO. Purchases must be made in percentages and total 100 per cent.

Note the following minimums:

- \$50 if you currently invest in the option.
- \$500 if you do not currently invest in the option.

Refer to the Generations Investment Options Product Disclosure Statement (PDS) for current details of all investment options.

Step 4: Auto-rebalancing option

Use this section if you would like to re-enable the Auto-rebalancing facility.

Step 5: Alteration to standing instructions

If you choose to sell all of any particular investment option, you should update your standing instructions in this section.

If an investment sold in full exists within standing purchase/sell instructions, and new instructions are not provided, the investment will be replaced with AXA – Cash Management in the standing purchase instructions and the standing sell instructions will be cancelled.

Step 6: Declaration and signature

You must sign and date the form before submitting.

Step 7: Financial adviser use only

Your financial adviser should complete their name and adviser number.

Once completed, please send this form to:

Summit Client 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: Managed Funds sales

Investment option	Product number	\$ value	Full sell
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="checkbox"/>
		Total	\$ <input type="text"/>

Step 3: Managed Funds purchases

Note: Some purchases required to complete your switch may not be actioned until the sale proceeds are received.

Investment option	Product number	Total purchase
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>	<input type="text"/> %
		Total 100%

Note: Switch requests will cause the Auto-rebalance facility (if applicable) to be cancelled. For further information, please contact your financial adviser, or Summit Client Service, on 1800 622 772.

