

Information sheet:

Switch request

When to use this form

Use this form to:

- switch your investment options
- elect to auto-rebalance your investments to your nominated investment profile
- transfer your Regular Investment Plan and/or your Regular Withdrawal Plan to your new options.

Important information

Note: Before completing your switch request, you should read and understand the following information:

- We will use the unit price next calculated where we receive all relevant information at an AMP processing centre by 3pm Sydney time. If we receive the information after 3pm Sydney time, we will treat it as if we received it the next Sydney business day.
- Once this switch request has been submitted, it **cannot** be cancelled.
- Switching between investment options is permitted at any time.
- There is currently no charge for switching investment options or for the auto-rebalancing facility. However, any difference between the entry and exit price for an investment option (ie buy/sell spread) is applied to the switch and auto-rebalancing transactions.
- Distributions will be reinvested if you do not indicate a distribution method (see the **Distribution method** column in section 4).
- Selling units to make withdrawals (for switching and auto-rebalancing) will reduce your investment capital and may result in a capital loss when you sell your units at times of depressed markets and low unit prices. It may also have a capital gains tax effect.

Auto-rebalancing

- The auto-rebalancing facility allows you to automatically rebalance the percentage (%) amounts within each of your investment options back in line with your preferred nominated investment profile. We refer to these percentage amounts as 'weightings'.
- The auto-rebalancing facility works by switching units between investment options in order to realign your investments as per your nominated investment profile.
- You can choose to have your account rebalanced either:
 - Quarterly—on or around 10 February, 10 May, 10 August and 10 November
 - Half yearly—on or around 10 February and 10 August
 - Yearly—on or around 10 August each year.

Note: If any of these dates fall on a weekend or a Sydney public holiday, we will rebalance your account on the next Sydney business day. Rebalancing may take up to two days to complete.

- We will initially rebalance your account at the time you select the auto-rebalancing facility using the enclosed **Switch request** form.
- All auto-rebalancing transactions (except the initial rebalance at the time you select the facility) will be subject to a 2% tolerance to prevent an auto-rebalance (switching of units) for significantly low amounts.
- All future contributions, switches, or withdrawals may affect your auto-rebalancing facility. Therefore, if you transact outside your nominated investment profile, we will automatically cancel the auto-rebalancing facility on your account, unless you advise us at that time that you want to change your nominated investment profile.
- Your auto-rebalancing facility will not be automatically cancelled as long as you transact on your account in line with your preferred weightings.
- A switch of your current balance and your future contributions must be according to the same nominated investment profile selected in the **Nominated profile** column in section 4 in the enclosed **Switch request** form. You cannot select auto-rebalancing if you would like your future contributions to be invested differently to your nominated investment profile.
- If you select only one investment option you are not eligible for auto-rebalancing.

Switch request

i Use this form to switch your investment options. You can also use this form to rebalance your investment options and transfer your Regular Investment Plan or Regular Withdrawal Plan to your new investment options.

Note: You can also perform switch transactions online via **My portfolio**—go to **amp.com.au** to log in or register.

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

1. PERSONAL DETAILS

Account number Product type

Title Date of birth

Surname

Given name(s)

Residential address

Suburb State Postcode

Contact phone number Mobile number

Email

2. AUTO-REBALANCE YOUR INVESTMENT OPTIONS

- i** – Your investments will automatically be rebalanced to your nominated profile as entered in the **Nominated profile** column in section 4.
- If you do not complete the **Nominated profile** column in section 4, auto-rebalancing will not occur.

I wish to have my investments automatically rebalanced:

Frequency Quarterly Half yearly Yearly

3. REGULAR INVESTMENT/WITHDRAWAL PLAN

- i** – If you have a Regular Investment Plan or a Regular Withdrawal Plan, place a **X** cross in the appropriate box(es) below if you wish to apply your new investments to any of these Plans.

Transfer my Regular Investment Plan to my new investment option(s) as selected in section 4.

Transfer my Regular Withdrawal Plan to my new investment option(s) as selected in section 4.

4. SWITCH INVESTMENT OPTIONS (maximum of 10 investment options)

Investment sectors and options	Code	Switch FROM	Switch TO	Nominated profile	Distribution method
Multi-sector investment options	AMP Balanced Enhanced Index	ABE	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Capital Balanced Growth	BAL	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Capital Conservative	CAP	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Conservative Enhanced Index	ACE	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Capital High Growth	GRO	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Monthly Income Fund No.1	M1F	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Monthly Income Fund No.2	M2F	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Monthly Income Fund No.2	M3F	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Balanced	FDB	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Conservative	FDC	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Growth^	FDG	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions High Growth^	FHG	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Moderately Conservative	FMC	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Responsible Investment Leaders Balanced	SBG	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Responsible Investment Leaders Conservative	RLC	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
Responsible Investment Leaders Growth	RLG	<input type="checkbox"/> %	<input type="checkbox"/> %	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	

Investment sectors and options		Code	Switch FROM	Switch TO	Nominated profile	Distribution method
Single sector investment options	AMP Australian Bond	AAB	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Australian Share	AAS	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Australian Share Enhanced Index	ENI	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Enhanced Cash	CPF	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Equity	EQU	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP International Share Enhanced Index	AIE	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Listed Property Trusts	LPT	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Arnhem Australian Equities	E1A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Bennelong Australian Equities	E3A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	BlackRock Global Bond	E3F	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	BlackRock Scientific Hedged International Share	E3I	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	BlackRock Scientific International Share	E5I	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	BT Australian Share	E4A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Colonial First State Australian Share	E2A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Fidelity Global Equities	F3I	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Asian Share	FDJ	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Australian Bond	FAB	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Australian Share	FDA	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Australian Small Companies	FSC	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Emerging Markets	FDM	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Geared Australian Share	FGS	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Hedged International Share	FHI	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions International Bond	FIB	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions International Share	FDI	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Property	FDP	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	GMO International Share	F4I	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Lazard Global Thematic	OPP	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Macquarie Intl Infrastructure Securities	MIS	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Perennial Hedged Global Property Securities	GLP	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Perennial Value Australian Share	F1A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Perpetual Industrial Share	E6A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Responsible Investment Leaders Australian Share	RLA	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Responsible Investment Leaders Intl Share	SIS	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
Schroder Australian Equities	E7A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	
Schroder Global Active Value	F1I	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	
SG Hiscock Listed Property	E1P	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	
T Rowe Price Global Equity	TPE	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	
Tyndall Australian Share Value	F3A	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	
UBS Australian Small Companies	SMA	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank	

Investment sectors and options	Code	Switch FROM	Switch TO	Nominated profile	Distribution method	
CLOSED OPTIONS						
Closed investment options	AMP Australian Bond (Original Series) ¹	IN1	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Blue Chip ¹	BLU	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Capital Enhanced Yield ^{2,3}	YLD	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Diversified Fixed Interest ¹	DFI	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Property Securities ¹	PRO	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Sustainable Future Australian Share ¹	SAS	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	AMP Value Plus ¹	VAL	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	BlackRock Income ¹	E2F	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Aust Share (Original Series) ¹	IMP	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
	Future Directions Intl Share (Original Series) ¹	INT	%	%	%	<input type="checkbox"/> Reinvest <input type="checkbox"/> Bank
			%	%	%	

1. Closed to investors who are not currently invested in these options. Once all funds have been withdrawn from this option they cannot be reinvested in the closed option.
 2. Not available for auto-rebalancing.
 3. These options are subject to restricted withdrawal and switch conditions (including auto-rebalancing) and no new monies can be invested in these options.
- ^ This also applies to the Future Directions Growth Original Series and Future Directions High Growth Original Series.

5. AUTHORITY AND SIGNATURE

I declare that:

- I/We want to apply for additional units in the unit trust(s) comprising Flexible Lifetime – Investments in accordance with the current **Product Disclosure Statement (PDS)***, and agree to be bound by the terms of the Constitution(s) and the **PDS**.
- I/We have received the current **Product Disclosure Statement* Part 1** and **Part 2**.
- I/We have read the relevant information provided in both **Part 1** and **Part 2** of the current **Product Disclosure Statement***, and have considered advice from my/our financial planner (if applicable).
- I/we have read and understood all of the information provided in the enclosed **Switch request** information sheet.

* **Product Disclosure Statement** means the current **PDS** and any supplements.

Investor A signature/Company Director/Power of Attorney

X

Date

Investor B signature/Company Director/Power of Attorney

X

Date

6. CHECKLIST

- Have you indicated which investment options you will be switching **FROM** and **TO**?
- Do all percentages add up to 100%?
- If applicable, have you provided us with instructions for your nominated investment profile for auto-rebalancing purposes?
- If applicable, have you indicated if your Regular Investment Plan or your Regular Withdrawal Plan is to be transferred to your new investment options?
- Have you completed, signed and dated the form?

Where to send this form:

Mail, fax or email the completed form to:



Flexible Lifetime – Investments
Reply Paid 79281
PARRAMATTA 2124



02 9257 7563



trustinfo@amp.com.au