

CHANGE FORM

ANZ KIWISAVER SCHEME &
ANZ DEFAULT KIWISAVER SCHEME



You can email this form and all required supporting documents to registry@anzinvestments.co.nz. Alternatively, you can take them to any **ANZ branch**, or post them to **ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland, 1142**.

1. YOUR INFORMATION

Mr Miss Mrs Ms Other

First name(s)

Surname

Date of birth ANZ customer (or investor) number

IRD number (please call Inland Revenue on 0800 775 247 for help)

2. WHAT WOULD YOU LIKE TO DO?

- Update your details (complete sections 3 and 6)
- Change how your KiwiSaver savings are invested (complete sections 4 and 6)
- Confirm your identity and residential address details (complete sections 3, 5 and 6)

3. UPDATE YOUR DETAILS

Home address

Postcode

Postal address (if different from your home address)

Postcode

Home phone Mobile

Email

Country of birth Occupation

Prescribed investor rate 10.5% 17.5% 28% (see anz.co.nz/pirupdate for help)

4. CHANGE HOW YOUR KIWISAVER SAVINGS ARE INVESTED

I would like to invest 100% of my KiwiSaver savings in (tick one):

- Lifetimes option Cash Fund Conservative Fund Conservative Balanced Fund
- Balanced Fund Balanced Growth Fund Growth Fund

OR, I would like to split my savings into different funds:

Splitting your current balance

Please split my current balance between the following funds:

Growth Fund	<input type="text"/>	%
Balanced Growth Fund	<input type="text"/>	%
Balanced Fund	<input type="text"/>	%
Conservative Balanced Fund	<input type="text"/>	%
Conservative Fund	<input type="text"/>	%
Cash Fund	<input type="text"/>	%
	1 0 0	%

Splitting your future contributions

Please split my future contributions between the following funds:

Growth Fund	<input type="text"/>	%
Balanced Growth Fund	<input type="text"/>	%
Balanced Fund	<input type="text"/>	%
Conservative Balanced Fund	<input type="text"/>	%
Conservative Fund	<input type="text"/>	%
Cash Fund	<input type="text"/>	%
	1 0 0	%

Your savings cannot be split between funds if you have chosen the Lifetimes option. Before splitting your investment between multiple funds, we recommend that you seek personalised advice from a financial adviser. Call 0800 269 238 to speak with an ANZ financial adviser. An ANZ financial adviser will provide you with their financial adviser disclosure statement on request and free of charge.

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5. IDENTIFICATION

As part of your application, you must provide certified copies of your valid ID and proof of address. An ANZ staff member or an ANZ Investments approved financial adviser can verify these documents. Alternatively a Notary Public, Justice of the Peace, NZ lawyer, or other person who has legal authority can certify these documents before sending them to us. See anz.co.nz/myid for more information.

If we need to ask you for further information, this will delay the processing of your application.

Identity documents

Please provide us with:

Option 1: ONE of these documents:

- New Zealand passport National ID card
 Overseas passport (signed) New Zealand firearms licence

Option 2: A New Zealand driver licence AND ONE of these documents (must be dated within the last six months):

- Bank statement Government Agency document (issued to you)
 SuperGold Card New Zealand Defence or Police Photo ID

Option 3: ONE form of primary non-photo ID

- New Zealand full birth certificate Certificate of New Zealand citizenship
 Overseas birth certificate Overseas citizenship certificate

AND

ONE form of secondary photo ID

- New Zealand driver licence New Zealand Defence or Police Photo ID
 International Driving Permit 18+ card or Kiwi Access Card



Here is an example of what your ID should look like when it's been certified correctly. Ensure the 'true likeness' wording is included, that the image of you is clear, and the text can be clearly read.

Proof of address

Please provide us with ONE of the below acceptable forms of address. The document must be dated within the last six months, addressed to you, and show your residential address.

- Utility bill Insurance document Letter from an Education Institution (Primary/Secondary school letters must be signed by the principal)
 Bank statement Car registration notification/demand
 Government agency document Electoral roll papers
 Signed rental tenancy agreement Electronic White/Yellow Pages

6. YOUR AGREEMENT

By signing this Change Form, I agree to be bound by the terms and conditions of the KiwiSaver scheme that I am a member of. These are set out in the governing document and the guide and product disclosure statement for the KiwiSaver scheme I am a member of. I confirm I understand that, by providing my email address and/or mobile number, I agree to receive emails or texts from ANZ Investments (or its related companies) about my investment (including annual reports by email) and, from time to time, any other relevant product or service offers.

If applicable, I confirm I have personally affixed my digital signature to this document.

If I am changing how my KiwiSaver savings are invested, I understand that my funds continue to be invested, and may rise and fall in value, until the transaction is approved and switch is completed.

Signature

Date

We aim to process your change and show it in your KiwiSaver account in ANZ Internet Banking and goMoney within 5 business days if you give us all the information we need. If we have to ask for more information, this may cause delays in the processing of your request.

CHANGE FORM

INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

Branch Stamp

Once completed – staff must scan this form and all required supporting documents in the checklist to registry@anzinvestments.co.nz