

The fastest way to provide us your form and supporting documents is to email them to registry@anzinvestments.co.nz. Alternatively you can post them to ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland 1142 or drop them into an ANZ branch.

1. Your information

Mr Miss Mrs Ms

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 my details (complete sections 3 and 5)
- Change how my KiwiSaver savings are invested (complete sections 4 and 5)
- Confirm my identity and residential address details (complete sections 3, 5 and 8)

3. Update your details

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

Employee contribution rate 3.5% 4% 6% 8% 10%

When you select a contribution rate, we'll provide this to Inland Revenue who will let your employer know. Your employer will deduct this percentage from your after-tax pay.

If you're self-employed, a contractor or not working, then this section is not applicable. Instead, you can make voluntary contributions at any time. If you're employed and don't choose a contribution rate, you'll contribute 3.5%.

Change form

4. Change how your KiwiSaver savings are invested

Choose 1 option.

Option 1:

I would like to choose the Lifetimes option, **OR**

Option 2: I would like to invest 100% of my KiwiSaver savings in (tick one):

High Growth Fund Growth Fund Balanced Growth Fund
 Balanced Fund Conservative Balanced Fund Conservative Fund Cash Fund

OR, Option 3: I would like to split my savings into different funds:

- Switch my current savings to another fund(s) and keep my future contributions in my existing fund(s) (complete column A)
- Switch my future contributions to another fund(s) and leave my existing savings in their current fund(s) (complete column B)
- Switch both my current savings and future contributions to another fund(s) (complete columns A and B)

A. Current savings

High Growth Fund	<input type="text"/>	%
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"/>	%
	<input type="text" value="1 0 0"/>	%

B. Future contributions

High Growth Fund	<input type="text"/>	%
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"/>	%
	<input type="text" value="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 Investment Adviser. An ANZ Investment Adviser will provide you with their financial adviser disclosure statement on request and free of charge.

Change form

5. 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

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6. How long will it take

Once we've received your form, we aim to action your request and show it in ANZ goMoney and Internet Banking within 5 business days. It may take longer if there are public holidays, or we need to ask you for additional information.

7. Privacy

You agree we can collect, use and disclose your information to process your application in accordance with our Privacy Statement, which is the same as ANZ Bank New Zealand Limited's and can be found at anz.co.nz/privacy. If you prefer a print version, it is available to download as a PDF or from any branch.

We take your privacy seriously, and understand the need to keep your information confidential and secure. You can access or correct your personal information by calling 0800 736 034 or asking at any ANZ branch. We may charge you a fee to access the information we have about you.

Change form

8. Identification

As part of your application, you must provide either verified or certified copies of your valid ID.

- **Verified** – An ANZ branch or an ANZ Investments approved financial adviser can check your original ID document(s). They can submit your application at the same time.
- **Certified** – A Notary Public, Justice of the Peace, NZ lawyer, or any other person who has the legal authority can certify a copy of your ID document(s) by checking them against the original(s). You can then send in these certified copies with your application form.

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 (including from ANZ)
- Central Government Agency document (issued to you)
- SuperGold Card
- New Zealand Defence or Police Photo ID

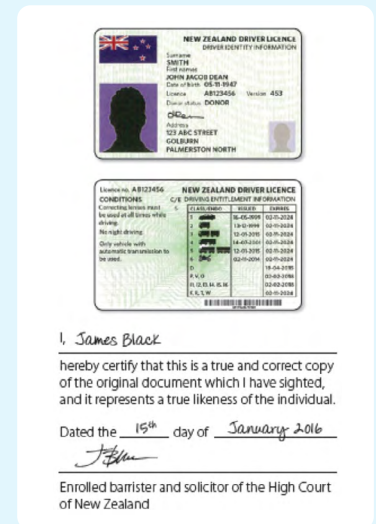
Option 3: ONE form of primary non-photo ID

- 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
- 18+ card or Kiwi Access Card
- New Zealand Defence or Police Photo ID

Example of correctly certified ID



Ensure the 'true likeness' wording is included, that the image of you is clear, and the text can be clearly read.

Internal use – ANZ staff only

hereby verify that this is the original document

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

Date