

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 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 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)

Employee contribution rate 3% 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%.

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4. CHANGE HOW YOUR KIWISAVER SAVINGS ARE INVESTED

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:

Splitting your current balance

Split my current savings between the following funds:

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"/>	%
	1 0 0	%

Splitting your future contributions

Split my future contributions between the following funds:

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"/>	%
	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.

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 **2 0**

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.

6. 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.

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7. IDENTIFICATION

As part of your application, you must provide either certified or verified 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
- Overseas passport (signed)
- National ID card
- 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
- SuperGold Card
- Central Government Agency document (issued to you)
- New Zealand Defence or Police Photo ID

Option 3: ONE form of primary non-photo ID

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

AND

ONE form of secondary photo ID

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



I, James Black

hereby certify that this is a true and correct copy of the original document which I have sighted, and it represents a true likeness of the individual.

Dated the 15th day of January 2016

James Black

Enrolled barrister and solicitor of the High Court of New Zealand

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 and show your name and current New Zealand residential address.

- Utility bill
- Signed rental tenancy agreement, flatting or sub-letting agreement
- Educational Institution letter from education facility, must be on letterhead paper
- Bank statement or bank document
- Electoral roll papers
- Short-term accommodation letter issued by the accommodation provider and include your name
- Non-bank financial institution statement or document
- Electronic White/Yellow Pages
- Letter from employer on company letterhead confirming residential address
- Central Government Agency document e.g. IRD, ACC
- Insurance policy document
- Car registration notification/demand
- Local Council/Government letter

INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

Branch Stamp

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

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