

# ANZ INVESTMENT FUNDS

## FORM 4 - TRANSACTION FORM

Product disclosure statement (PDS) dated 31 March 2022



Email your form to us at [registry@anzinvestments.co.nz](mailto:registry@anzinvestments.co.nz) or post it to: **ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland 1142.** If you are emailing your forms, you do not need to post them to us.

### 1. Investor information

First name(s)  Surname

First name(s)  Surname

or  Company/Partnership/Trust/Estate name

ANZ customer (or investor) number  (if known)

IRD number    (please call Inland Revenue on 0800 775 247 or +64 4 978 0779 for help)

Contact phone

Email

### 2. What would you like to do?

Update your prescribed investor rate (please complete sections 3 and 6)

Change the fund you invest in (please complete sections 4 and 6)

Make a lump sum payment (please complete sections 5 and 6)

### 3. Update your prescribed investor rate

Prescribed investor rate  0%  10.5%  17.5%  28% (visit [anz.co.nz/pirupdate](http://anz.co.nz/pirupdate) for help)

### 4. Change the fund you invest in

Switch your current balance to another fund(s) (complete column A)

Switch your future payments to another fund(s) (complete column B)

Switch both your current balance and future payments to another fund(s) (complete columns A and B)

#### A. Switch your current balance to the following fund(s):

Conservative Fund  % or \$

Conservative Balanced Fund  % or \$

Balanced Fund  % or \$

Balanced Growth Fund  % or \$

Growth Fund  % or \$

**Total**  **100%** or \$

#### B. Switch your future payments to the following fund(s):

% or \$

% or \$

% or \$

% or \$

% or \$

**100%** or \$

1. Percentages must be whole numbers and add up to 100%.

2. If you make regular payments by direct debit, the total dollar value in column B must be the same as your existing regular payment. To increase or reduce your regular payments, please complete a new direct debit form (Form 3).

3. The minimum switch amount is \$500.

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## 5. Make a lump sum payment

Lump sum payment amount \$

Please confirm:  I will deposit a lump sum payment via online or phone banking

Particulars (surname)  Code (date of birth)  Reference (investor number or IRD number)

You can make your payment to: **ANZ Investment Funds Application Account, ANZ, 01-1839-0154747-00.**

We must receive your transaction form before we receive your payment. Otherwise your payment will be allocated to your fund(s) in the same percentage as your last payment.

If the payment is from a third party, please confirm the relationship of the third party to the investor (e.g. parent):

Please invest my lump sum payment (tick one):

As per my existing investment selection

As indicated below

Conservative Fund	\$ <input type="text"/>
Conservative Balanced Fund	\$ <input type="text"/>
Balanced Fund	\$ <input type="text"/>
Balanced Growth Fund	\$ <input type="text"/>
Growth Fund	\$ <input type="text"/>
<b>Total</b>	\$ <input type="text"/>

(the total dollar value must be the same as your lump sum amount above)

## 6. Your agreement

By signing this transaction form, you confirm that you have received and read the ANZ Investment Funds product disclosure statement dated 31 March 2022 and that you agree to be bound by the ANZ Investment Funds' terms and conditions current at the time of any investment. These are set out in the product disclosure statement, online register entry, application form and governing document. The most recent product disclosure statement may help you make decisions about whether or not to acquire units in the funds and is available at [anz.co.nz/investmentdocs](http://anz.co.nz/investmentdocs). If signed under power of attorney, that attorney confirms that he/she has not received notice of revocation of that power.

If applicable, I/we have personally affixed my/our digital signature(s) to this document.

Signature

Date

Signature

Date

## FOR BANK USE ONLY

Staff member or adviser

Branch number

Staff number

Agency code

Branch name