OneAnswer KiwiSaver Scheme Change form



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. 1. Your information Other Mr Miss Mrs Ms First name(s) Surname Date of birth ANZ customer (or investor) number (if known) IRD number (please call Inland Revenue on 0800 775 247 for help) 2. What would you like to do? (tick one) 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 Home address Postcode Postal address (if different from your home address) Postcode Home phone Mobile **Email** Country of birth Occupation Prescribed investor rate (PIR) 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%.

OneAnswer KiwiSaver Scheme - Change form

4. Change how your KiwiSaver sav	rings are inv	es [·]	ted			
Select the Lifetimes option OR Switch my current savings to another fur Switch my future contributions to another Switch both my current savings and fur	er fund(s) and l	keel	p my current savings in my	existi	ing fund(s) (complete column	
	A. Current savings			B. Future contributions		
High Growth Fund	%	or	\$		%	
Growth Fund	%	or	\$		%	
Balanced Growth Fund	%	or	\$		%	
Balanced Fund	%	or	\$		%	
Conservative Balanced Fund	%	or	\$		%	
Conservative Fund	%	or	\$		%	
Cash Fund	%	or	\$		%	
New Zealand Fixed Interest Fund	%	or	\$		%	
International Fixed Interest Fund	%	or	\$		%	
Australasian Property Fund	%	or	\$		%	
International Property Fund	%	or	\$		%	
Australasian Share Fund	%	or	\$		%	
International Share Fund	%	or	\$		%	
Select International Share Fund	%	or	\$		%	
Total	100%	or	\$		100%	

Note: Before splitting your investment between multiple funds, we recommend that you seek personalised advice from your financial adviser.

OneAnswer KiwiSaver Scheme - Change form

5. Your agreement

By signing this Change Form, I agree to be bound by the OneAnswer KiwiSaver Scheme's terms and conditions. These are set out in the governing document and the guide and product disclosure statement. I confirm I understand that, by providing my email address and/or mobile number, I will 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.



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.

8. Identification

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

- Verified An ANZ branch or an ANZ Investments approved financial adviser can check your original ID and proof of address documents. 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 and proof of address documents by checking them against the originals. 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.

OneAnswer KiwiSaver Scheme - Change form

Identity documents Please provide us with:		Example of correctly certified ID		
Option 1: ONE of these documents: New Zealand passport Overseas passport (signed)	National ID card documents: New Zealand firearms licence	IN W ZI ALAND DRIVER LICENCE DRIVER SUPERIOR AND		
Option 2: A New Zealand driver lices (must be dated within the last six m Bank statement (including from ANZ Central Government Agency docum SuperGold Card New Zealand Defence or Police Pho	Continue APIZINS MORE TRANSPORTED EXECT			
Option 3: ONE form of primary non- New Zealand full birth certificate Overseas birth certificate	-photo ID Certificate of New Zealand citizenship Overseas citizenship certificate AND	of the original document which I have sighted, and it represents a true likeness of the individual. Dated the 15th day of Sanuary 2016 Enrolled barrister and solicitor of the High Court of New Zealand		
AND ONE form of secondary photo New Zealand driver licence New Zealand Defence or Police Pho	18+ card or Kiwi Access Card	Ensure the 'true likeness' wording is included, that the image of you is clear, and the		
Proof of address		text can be clearly read.		
Please provide us with ONE of the belo	w acceptable forms of address. ne last six months and show your name and	current New Zealand address.		
Utility bill Bank statement or bank document (including from ANZ) Non-bank financial institution statement or document Central Government Agency document (e.g. IRD, ACC) Local Council/Government letter Signed rental tenancy agreement, flatting or sub-letting agreement	Electronic White/Yellow Pages Insurance policy document Car registration notification/demand Educational Institution letter from education facility, must be on letterhead paper Short-term accommodation letter issued by the accommodation provider and include your name	Letter from employer on company letterhead confirming residential address Letter from a lawyer or accountant confirming your residential address Retirement home letter or invoice Letter or invoice from your general practitioner (GP)		
Internal use – ANZ staff only				
Staff full name hereby verify that this is the original do	cument	Bank stamp		
Signature Signature		bank stamp		
Staff job role	Branch name			
Once completed – staff must scan this documents in the checklist to registry(Date D D M M 2 0 Y Y		