

Scan and email your completed form to [service@anzinvestments.co.nz](mailto:service@anzinvestments.co.nz), or alternatively you can bring it to any **ANZ branch**, or post it to **OneAnswer KiwiSaver Scheme, Attention: ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141.**

**1. YOUR INFORMATION**

Mr  Miss  Mrs  Ms  Other

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?**

- Update your details (complete sections 3 and 6)
- Change how your KiwiSaver savings are invested (complete sections 5 and 6)
- Confirm your identity and residential address details (complete sections 3, 4 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 [anzinvestments.co.nz/pirupdate](http://anzinvestments.co.nz/pirupdate) for help)

# CHANGE FORM

## 4. IDENTIFICATION

As part of your application, you must provide certified copies of your ID and proof of address. All photocopied documents must be verified or certified by an authorised person, such as a Justice of the Peace, before sending them to us.

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

Please provide us with either:

- a certified/verified copy of your current passport (page showing your name, date of birth, photograph and signature), or
- a certified/verified copy of your current driver licence showing your name, signature and expiry date and a bank account statement issued **to you** by a registered bank (excluding ANZ), or
- a certified/verified copy of your current firearms licence.

AND one of the following:

- a certified/verified copy of a bank statement issued to you by a registered bank (excluding ANZ) (which can't be more than six months old), or
- a certified/verified copy of your utility bill (which can't be more than six months old), or
- a certified/verified copy of an insurance policy document issued to you (which can't be more than six months old), or
- a certified/verified copy of a Government agency document issued to you (which can't be more than six months old).

Who can certify your documents?

An ANZ staff member or an ANZ Investments approved financial adviser can verify your ID and proof of address. Alternatively, the following people can certify photocopies of original documents as true and correct copies in

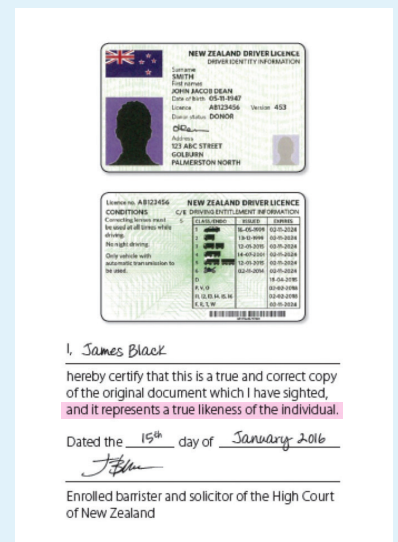
- Notary Public
- Justice of the Peace
- Member of the Police
- New Zealand lawyer
- New Zealand Chartered Accountant
- A person who has legal authority to take statutory declarations (or equivalent) in New Zealand.

If you are overseas: a person who has authority to take statutory declarations or equivalent in your country.

Please note that the certifier must be at least 16 years of age and cannot be:

- a person involved in the transaction requiring the certification
- related to you
- your spouse or partner
- a person who lives at the same address as you.

Here is an example of what your ID should look like when it's been certified correctly. Ensure the 'true likeness' wording is included.



See [anz.co.nz/myid](http://anz.co.nz/myid) for a full list of acceptable documents and ways documents can be certified or verified. Alternatively, talk to an ANZ staff member or your financial adviser. Remember to include your certified/verified ID and proof of address with your application. Any information missing from your application will cause delays.

# CHANGE FORM

## 5. CHANGE HOW YOUR KIWISAVER SAVINGS ARE INVESTED

- Lifetimes option **OR**
- Switch your current balance to another fund(s) (complete column A)
- Switch your future contributions to another fund(s) (complete column B)
- Switch both your current balance and future contributions to another fund(s) (complete columns A and B)

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

**B.** Switch your future contributions to the following fund(s):

Conservative Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Conservative Balanced Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Balanced Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Balanced Growth Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Growth Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Cash Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
New Zealand Fixed Interest Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
International Fixed Interest Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Australasian Property Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
International Property Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Australasian Share Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
International Share Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
Sustainable International Share Fund	<input type="text"/> %	<b>or</b>	<input type="text"/> \$	<input type="text"/> %	<b>or</b>	<input type="text"/> \$
<b>Total</b>	<input type="text"/> 100%	<b>or</b>	<input type="text"/> \$	<input type="text"/> 100%	<b>or</b>	<input type="text"/> \$

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

# CHANGE FORM

## 6. YOUR AGREEMENT

By signing this Change Form, you 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. You are also confirming you understand that, by providing your email address and/or mobile number, you will receive emails or texts from ANZ Investments (or its related companies) about your investment (including annual reports by email) and, from time to time, any other relevant product or service offers.

Signature

Date

### 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 [service@anzinvestments.co.nz](mailto:service@anzinvestments.co.nz)