New Zealand Retirement Trust (NZRT) Changing Your Investments

Member Details – Please ensure all boxes are fully completed to assist processing.

Member Number

Date of Birth D D M M Y Y Y Y

Member's Name

B L O C K L E T T E R S

Plan/Employer's Name

Member's Address

Member's Contact Phone No (home)

Member's Contact Phone No (work/mobile)

Email Address (personal)

IRD Number - -

PIE Tax Rate* 19.5% ☐ 30% ☐

(If you have an 8 digit IRD number, please leave the first box blank)

Notes

Before completing this form you should refer to your copy of the Plan's Benefit Schedule, to see what changes you are allowed to make to your investments.
If you have already made one switch of your existing investments to another investment option in the past year, a fee may be payable.
Special conditions, as set out in the Investment Statement, may apply to the transfer or withdrawal of funds from the AMP Capital Assured Fund.
PIE Tax, as set out in the Investment Statement, may be deducted when funds are switched.

Investment of Existing and Future Contributions

Depending on the terms of your Plan, you may be able to choose up to six investment options.

- If you wish to switch the current balance(s) of all your accounts to new funds, but wish to leave the allocation of regular contributions as they stand, please complete the % of Existing Funds column only.
- If you wish to leave the balance(s) of your existing accounts in the current funds but wish to change the investment of future contributions, complete the % of Future Contributions column only.
- If you wish to shift the current balance(s) of all your accounts to new funds, and have all future contributions invested in these new funds, complete the % of Existing Funds and the % of Future Contributions columns.
- If you are adding a voluntary lump sum contribution, or transferring funds from another superannuation scheme, please complete the Additional Lump Sum column and complete the payment details section below. If you would like this amount invested in the same proportion as your current investment(s) please tick here ☐.

Risk Profile	Fund Name	Additional Lump Sum	% of Existing Funds	% of Future Contributions	% of Lump Sum
All	Lifesteps Investment Programme				
Conservative	AMP Capital Assured Fund				
	Cash Fund				
Moderately Conservative	AMP Capital Stable Fund				
Balanced	AMP Balanced Fund				
	ASB Balanced Fund				
	Tyndall Balanced Fund**				
	ING Balanced Fund				
	TOWER Balanced Fund				
Aggressive	AMP High Equity Fund				
TOTALS			100%	100%	

Please note: The Lifesteps Investment Programme is age-based. Please check you've provided your correct date of birth in the Member Details section above, as we'll invest your funds in accordance with that date of birth. We take no responsibility for incorrect information.

Payment Details

The additional lump sum contribution will be made as follows:

☐ A cheque, made out to AMP Services (NZ) Limited for $ _____ is attached.

☐ By way of electronic contribution to AMP Services (NZ) Limited.

☐ Transferred to AMP from _____ (name of superannuation fund).

Authorisation

To AMP Services (NZ) Limited (AMP):
Please process my investment instructions set out above.

1. I understand that if AMP accepts these instructions, they will be implemented as soon as possible after AMP has received this form, and will apply until further notice.
2. I acknowledge that any fees payable will be deducted from my Member Account.
3. I acknowledge that if for any reason AMP is not able to accept or process these investment instructions, AMP will contact me. Until such time as these investment instructions are accepted and processed by AMP, any contributions I make will be invested in accordance with the existing investment instructions.
4. I acknowledge that none of my Employer, the Trustee, or the Administration Manager of NZRT, guarantee the performance of the investment funds within NZRT.

Signed by the Member SIGN

Date D D M M Y Y Y Y

For Office Use Only

Processed by

Acknowledged on D D M M Y Y Y Y

Date processed D D M M Y Y Y Y

*If no PIE Tax details are supplied, the default PIE Tax Rate of 30% will be used.

**This investment option was managed by BT Funds Management (NZ) Limited and was called the BT Balanced Fund until on or around 26 June 2008. After this date the investment option will be managed by Tyndall Investment Management New Zealand Limited with the name change to Tyndall Balanced Fund.