



RESET FORM

Please email this completed form and supporting documents to: **investments@amp.co.nz** or post to **AMP Services (NZ) Limited** Freepost 170, PO Box 55 Shortland Street, Auckland 1140 **We're here to help** If you have any questions, please contact your Adviser or call Customer Services on 0800 267 111

# AMP Investment Trust

## Transfer of ownership

Please complete this form if you would like to change the ownership of your investment in the AMP Investment Trust (AIT). This form can be completed on-screen by typing content directly into the PDF document. Please use block letters if you're not completing this form online. Once you have completed your details, sign and email or post the form and any supporting documents to the address above.

\*These fields must be completed

### (a) Details of transfer

Portfolio number

Date of transfer

\*Transferor(s) (current owner(s) 1)

\*Transferor(s) (current owner(s) 2)

\*Address (to which confirmation will be sent)

Postcode

Email

Please provide at least one contact phone number

Home

Work phone

Mobile phone

Name of investment fund

Enter the number of units to be transferred.

Please transfer **all** of my units

Prescribed Investor rate (PIR)#

0%  10.5%  17.5%  28%

#We deduct PIE tax from your transfer using the information we have at the time your transfer is processed. If this is a joint account, you must select the highest applicable PIR of the individuals. If you're unsure of your PIR, please go to **amp.co.nz/pie** or contact your Adviser or Inland Revenue.

Signature(s)

Date

Signature(s)

Date

### Name of witness

\*First names of witness

\*Surname of witness

\*Address of witness

Postcode

Signature(s)

Date

### \*Advice

Have you received financial advice from an Adviser in making this decision?

Yes

No

If yes, please ensure your Adviser completes Section (c).

### (b) Transferee(s) (new owner(s))

AIT Portfolio number (if applicable)

\*Transferee(s) (new owner(s) 1)

\*Transferee(s) (new owner(s) 2)

\*Address (to which confirmation will be sent)

Postcode

Email

Please provide at least one contact phone number

Home

Work phone

Mobile phone

### Signature(s)

A new application form is also required if the transferee does not already own units in AIT.

Verification of Identity is required for any new owners who are not current AIT clients. Details of Verification of Identity requirements are set out within the application form.

Signature(s)

Date

Signature(s)

Date

