



AMP Investment Trust (AIT)

Change of personal details form

Please email the 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 us on 0800 267 111.

RESET FORM

Use this form to change your investment product personal details.

This form can be completed on-screen by typing content directly into the PDF document. Once you have completed your details, sign and send the form and any supporting documents to the email address above.

If you would like any help or have any questions when completing this form, please contact your Adviser or call Customer Services on 0800 267 111.

*These fields must be completed

(a) Your personal details

*Plan/Portfolio number

*Plan/Portfolio number

*Date of birth

^Title

 Mr Mrs Ms Miss Mx Dr Other

*Name

*Postal Address

*Please provide at least one contact number.

Home Phone

Work Phone

Mobile Phone

*Personal Email

IRD number

PIE tax rate^:

 0% 10.5% 17.5% 28%

Resident withholding tax rate†:

 10.5% 17.5% 30% 33% 39%

(b) New details

Please indicate which details you are changing by ticking the box below.

^Title

 Mr Mrs Ms Miss Mx Dr Other

Name

Please attach a copy of the document showing the legal change of name (eg. marriage certificate or deed poll).

Address

Telephone

Home Phone

Work Phone

Mobile Phone

Personal Email

IRD number

PIE tax rate^:

 0% 10.5% 17.5% 28%

Resident withholding tax rate†:

 10.5% 17.5% 30% 33% 39%

^ If no PIE Tax Rate is selected, you will be defaulted to 28% unless you have previously notified us of your rate. If this is a joint account, you must select the highest applicable PIE Tax Rate of the individuals.

† If no resident withholding tax rate is selected, you will be defaulted to 33% unless you have previously notified us of your rate.

***(c) Your signature**

I/We advise that the above information is correct and that AMP is authorised to amend my records to reflect these changes. If there is more than one owner, please ensure that all owners sign below.

Member Signature

SIGN HERE

Date

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Member Signature

SIGN HERE

Date

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