



New Zealand Retirement Trust (NZRT)

Changing your investments

Please send this completed form and supporting documents to:

Email workplaceadmin@amp.co.nz
or

AMP Customer Services - NZRT

Freepost 170, PO Box 55

Shortland Street, Auckland 1140

If you have any questions please contact your Adviser or call us on 0800 800 267.

Use this form to switch your existing investments to a different investment option(s) and/or change where your future contributions will be invested.

If your NZRT membership is through an employer plan, please refer to your member booklet to see what changes you are allowed to make to your investments. Please refer to the Product Disclosure Statement (PDS), Fund Update Booklet and your member booklet (if applicable) for any fees that may apply.

Special conditions, as set out in the PDS, may apply to the transfer or withdrawal of funds from the AMP Capital Assured Fund.

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

A disclosure statement is available from your Adviser, on request and free of charge.

*These sections must be completed

(a) *Your personal details – Please ensure all boxes are fully completed to assist processing

Member number

Title

 Mr Mrs Ms Miss Dr Other

Date of birth

First names

Surname

Residential address

Postcode

Postal address (if different to residential address)

Postcode

Please provide at least one contact phone number

Home phone

Work phone

Mobile phone

Email

IRD number

Prescribed Investor Rate (PIR)

 10.5% 17.5% 28%

We may collect PIE tax when your funds are switched using the information we have at the time you switch - if your PIR has changed, please tell us your correct rate. Visit amp.co.nz/pie, or ird.govt.nz to help determine your PIR.

Plan/Employer's name (if applicable)

(b) *Investment of existing and future contributions

You can choose up to seven investment options which must add up to 100% of contributions. If your NZRT membership is through an employer plan, please check your member booklet to see the changes you are allowed to make.

- 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 use the ‘% of lump sum’ column in the table below and complete section (c) Additional lump sum payment details. If you would like this amount invested in the same proportion as your current investment(s) please tick here

Select your investment options

Investment option/funds	% of existing funds	% of future contributions	% of lump sum ¹
AMP Lifesteps Investment Programme			
Diversified funds			
AMP Conservative Fund			
AMP Moderate Fund			
AMP Moderate Balanced Fund			
AMP Balanced Fund			
AMP Growth Fund			
AMP Aggressive Fund			
AMP Capital Assured Fund			
AMP Responsible Investment Balanced Fund			
ANZ Conservative Fund			
ANZ Balanced Growth Fund			
ANZ Growth Fund			
ASB Moderate Fund			
ASB Balanced Fund			
ASB Growth Fund			
Mercer Balanced Fund			
Nikko AM Conservative Fund			
Nikko AM Balanced Fund			
Nikko AM Growth Fund			
Goal-based funds			
AMP Income Generator Fund			
AMP Global Multi-Asset Fund			
Single sector funds			
AMP Cash Fund			
AMP New Zealand Fixed Interest Fund			
AMP International Fixed Interest Fund			
AMP Australasian Shares Fund			
AMP International Shares Fund			
AMP Passive International Shares Fund			
AMP Property Fund			
Total	100%	100%	100%

Please note: The Lifesteps Investment Programme is age-based. Please check you have provided your correct date of birth in section (a), as we will invest your funds in accordance with that date of birth. We take no responsibility for incorrect information.

¹Please use this column only if you wish to make an additional lump sum and you have completed section (c) below.

Have you received financial advice from an Adviser in making the decision to change your investment? Yes No

If yes, please ensure your Adviser completes section (e).

(c) Additional lump sum payment details

Please tell us how you are making the additional lump sum payment.

A cheque, made out to AMP NZRT for \$ is attached.

Internet banking to AMP NZRT.

Transferred to AMP from (name of superannuation fund).

(d) *Your signature

To AMP Wealth Management New Zealand Limited (AMP):

Please process my investment instructions set out above.

1. I confirm that I have received, read and understood the current NZRT Product Disclosure Statement and Fund Update Booklet.
2. 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 I advise AMP otherwise.
3. I acknowledge that any fees payable will be deducted from my member account.
4. I acknowledge that tax will be calculated and collected/rebated (where appropriate) at my recorded PIR and that it is my responsibility to notify AMP of my correct PIR.
5. 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.
6. I acknowledge that neither my Employer or AMP guarantees the performance of the investment funds within the NZRT.

I confirm that the above information is correct and I request that AMP update its records to reflect the changes specified in this form.

*Member signature

SIGN HERE

*Date

D D M M Y Y Y Y

(e) For Adviser use only

AMP Adviser name (if applicable)

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

AMP Adviser number

FSPN (please use your QFE's FSPN if you are a QFE Adviser)

I confirm that I am an

- AFA (entitled to sell Category 1 Product)
- AMP QFE Category 1 Adviser
- Other _____

And I certify that the information provided in this Adviser Information section is correct and that I have complied with the requirements of the Financial Advisers Act 2008 and all other applicable laws.

Signature of Adviser

SIGN HERE

Date

D D M M Y Y Y Y

***Checklist**

Please check you have completed the form correctly

- Have you completed all sections with an *?
- Have you completed the table in section (b) correctly?
- Have you signed in section (d)?
- If you have received financial advice, has your Adviser completed the Adviser section above (section (e))?