

Please send this completed form and supporting documents to:  
**Email [workplaceadmin@amp.co.nz](mailto: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.**

# New Zealand Retirement Trust (NZRT)

## Changing your investments

**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 Declared Rate 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

Personal email address

IRD number

(Please note: We cannot process your application until we receive your IRD number.)

Prescribed Investor Rate (PIR)

 10.5%  17.5%  28%

If your PIR has changed, please tell us your correct rate.

To help determine your PIR, go to [amp.co.nz/PIE](http://amp.co.nz/PIE) or [ird.govt.nz](http://ird.govt.nz). Inland Revenue may also instruct AMP to apply a different PIR.

If a PIR is not selected or you supply an incorrect IRD number, the default rate of 28% will apply. Inland Revenue may also instruct AMP to apply a different 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.

Select your investment options

Investment option/funds	% of existing funds	% of future contributions
AMP Lifesteps Investment Programme		
<b>Diversified funds</b>		
AMP Conservative Fund		
AMP Moderate Fund		
AMP Moderate Balanced Fund		
AMP Balanced Fund		
AMP Growth Fund		
AMP Aggressive Fund		
Declared Rate Fund <sup>1</sup>		
AMP Balanced Fund No. 2 <sup>2</sup>		
ANZ Conservative Fund		
ANZ Balanced Growth Fund		
ANZ Growth Fund		
Mercer Balanced Fund		
Milford Conservative Fund		
Milford Balanced Fund		
Milford Active Growth Fund		
Milford Aggressive Fund		
SuperLife Moderate Fund <sup>3</sup>		
SuperLife Balanced Fund <sup>4</sup>		
SuperLife Growth Fund <sup>5</sup>		
<b>Single sector funds</b>		
AMP Cash Fund		
AMP NZ Fixed Interest Fund <sup>6</sup>		
AMP Global Fixed Interest Fund		
AMP Australasian Shares Fund		
AMP International Shares Fund		
AMP International Shares Fund No. 2 <sup>7</sup>		
ANZ Property Fund <sup>8</sup>		
<b>Total</b>	<b>100%</b>	<b>100%</b>

### Please note:

The AMP 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.

<sup>1</sup>Formerly AMP Capital Assured Fund

<sup>2</sup>Formerly AMP Ethical Balanced Fund

<sup>3</sup>Formerly ASB Moderate Fund

<sup>4</sup>Formerly ASB Balanced Fund

<sup>5</sup>Formerly ASB Growth Fund

<sup>6</sup>Formerly AMP Capital NZ Fixed Interest Fund

<sup>7</sup>Formerly AMP Passive International Shares Fund

<sup>8</sup>Formerly AMP Capital Listed Property Fund

### Do you have an Adviser?

(i.e. an individual who is authorised to provide financial advice to you in relation to AMP products)

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

Yes  No

**(d) \*Your signature**

To AMP Wealth Management New Zealand Limited (AMP):

1. Please process my investment instructions set out above.
2. I confirm that I have received, read and understood the current NZRT Product Disclosure Statement and Fund Update Booklet.
3. 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.
4. I acknowledge that any fees payable will be deducted from my NZRT account.
5. 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.
6. 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.
7. I acknowledge that neither my Employer, AMP, or the Trustee 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
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\*Date

D	D	M	M	Y	Y	Y	Y
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**(e) For Adviser use only**

Adviser name

B	L	O	C	K		L	E	T	T	E	R	S							
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AMP Adviser code

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Adviser's business name

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I certify that I have completed the most recent training provided by AMP for this product, and have complied with the requirements of the Financial Markets Conduct Act 2013, and all other applicable laws.

Signature of Adviser

SIGN HERE
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Date

D	D	M	M	Y	Y	Y	Y
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**\*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 section (e)?