



# Request to add Telephone Transaction Service

Please send this completed form and any supporting documents to:  
**AMP Services (NZ) Limited**  
Freepost 170, PO Box 55  
Shortland Street, Auckland 1140  
If you have any questions please contact your Adviser or call us on 0800 267 111.

Use this form to add the Telephone Transaction Service to your investment. 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.

Product

- Saving & Investment Portfolio - Unit Trust (UT) & Personal Retirement Plan (PRP)
- AMP Investment Suite - AMP Investment Trust (AIT) & Personal Superannuation Scheme (PSS)

Portfolio number

Portfolio number

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Date of birth

D	D	M	M	Y	Y	Y	Y
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First names

Surname

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Date of birth

D	D	M	M	Y	Y	Y	Y
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First names

Surname

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Date of birth

D	D	M	M	Y	Y	Y	Y
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First names

Surname

Name of Entity (for Trusts, partnerships and companies only)

## (a) Special conditions of AMP Telephone Transactions

- Your regular payments can be redirected between investment options only within and between the investment options you are contributing to.
- Your units can be switched between investment options only within and between the investment options in which they are already held and only between investment options within your Unit Trust and Superannuation Scheme respectively.
- Telephone transactions can carry a risk of misunderstanding or argument about what was, and was not, authorised by a client. If you give us instructions over the phone, we may record them in any way we think fit (including on tape). Any record we make is conclusive proof of your instructions.
- AMP is not bound to accept instructions unless it has verified your identity through matching of your name, client number, and bank account number (or other unique identifier). AMP may take that verification as conclusive proof of your identity, but is not liable for refusing to accept any instruction, nor for good faith acceptance of any instruction believed on reasonable grounds to have been appropriately authorised (whether or not it was so authorised).

**(b) By using the Telephone Transaction Service, you**

- Release, discharge and agree to indemnify AMP and its subsidiaries, and the Supervisor from and against all actions, claims and liabilities arising from or in relation to telephone instructions.
- Agree that should you, or any other person claiming to be you, act fraudulently, AMP and its subsidiaries are not liable for following those instructions.
- Agree that for joint ownership, AMP can accept instructions from one owner, without reference to the other(s).

I wish to have access to the Telephone Transaction Service provided by AMP. In doing so, I agree to the terms and conditions of that service as listed in either the Investment Statement or the AIT investing and withdrawing document (as applicable) and as shown above. I understand and agree that if investments are jointly held, one owner can authorise any part of that service without reference to the other owner(s).

For your added security, you may nominate a 'secret question' and 'secret answer', which AMP staff will use to confirm your identity before releasing information or carrying out Telephone Transaction requests.

Secret Question

Secret Answer

Signature

Date

Signature

Date

Signature

Date

(For Telephone Transaction Service to be added, ALL plan owners must sign this form)

**Telephone Transaction Service Terms and Conditions**

You can request various transactions over the telephone using the Telephone Transaction Service. For your protection, a number of special conditions set out below and in the relevant Investment Statement or Product Disclosure Statement apply. The appropriate Trust Deed governs all Telephone Transactions.

The following are the transactions available through the Telephone Transaction Service:

- Withdrawals
- Change the amount of your regular savings payment
- Request, increase, decrease or decline automatic increases to your regular savings payment
- Redirect regular savings payments into another investment option
- Switch units between investment options