



AMP State Sector Retirement Savings Scheme (SSRSS)

Changing your investments

Please send this completed form and supporting documents to:

Email workplaceadmin@amp.co.nz

or

NZRT Customer Services

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 and/or change where your future contributions will be invested.

Before completing this form you should refer to your member booklet, to see what changes you are allowed to make to your investments. If you have already made one switch of your existing investments to another investment option in the past year, a fee may be payable.

Special conditions, as set out in the Product Disclosure Statement, 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 fields 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

Email

Please provide at least one contact phone number

Home phone

Work phone

Mobile phone

IRD number (if you have an 8 digit IRD# leave the first box blank)

If no PIR is supplied or your IRD number is incorrect, the default PIR of 28% will be used.

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. If you're unsure of your PIR, please go to amp.co.nz/pie for help or contact your Adviser or Inland Revenue.

(b) *Investment of existing and future contributions

Depending on the terms of your Plan, you may be able to choose up to seven funds.

- 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 complete the **Additional Lump Sum** column and complete section (c). If you would like this amount invested in the same proportion as your current investment(s) please tick here

Investment option/funds	Additional lump sum	% of existing funds	% of future contributions	% of lump sum
Lifesteps Investment Programme				
Cash Fund				
Diversified funds				
AMP Conservative Fund				
AMP Capital Assured Fund				
AMP Moderate Fund				
AMP Moderate Balanced Fund				
AMP Balanced Fund				
ANZ Balanced Growth Fund				
ASB Balanced Fund				
Mercer Balanced Fund				
Nikko AM Balanced Fund				
AMP Growth Fund				
AMP Aggressive Fund				
AMP Responsible Investment Balanced Fund				

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

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're making the additional lump sum payment.

- A cheque, made out to AMP NZ Retirement Trust for \$ is attached.
- Internet banking to AMP NZ Retirement Trust.
- 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.

- 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.
- I acknowledge that any fees payable will be deducted from my Member Account.
- 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.
- 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.
- I acknowledge that neither my Employer or the Trustee guarantees the performance of the investment funds within 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
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(e) For Adviser use only

AMP Adviser name (if applicable)

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

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

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I confirm that I am an

- AFA (entitled to sell Category 1 Product)
- AMP QFE Category 1 & 2 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
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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)?