

Personal Retirement Plan

Additional investment and switch form (for existing investors)

Use this form to switch investments or to make additional investments in the AMP Personal Retirement Plan (PRP).

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) Your personal details

Portfolio number

Title

 Mr Mrs Ms Miss Dr Other

Date of birth

First names

Surname

Email

Residential address

Postal address (if different from above)

Postcode

Please provide at least one contact number

Home phone

Work phone

Mobile phone

^Complete if joint membership

^Title

 Mr Mrs Ms Miss Dr Other

^Date of birth

^First names

^Surname

Email

Residential address

Postal address (if different from above)

Postcode

Please provide at least one contact number

Home phone

Work phone

Mobile phone

(b) Personal Retirement Plan – Use the information immediately below to complete section c, d, e and/or f on the reverse.

1. If you are invested in any of these funds listed in the table immediately below, you can switch between or make additional investments into these funds. You can only switch into AMP New Zealand Shares Fund under (2) below or AMP International Shares Fund No. 2 under (3) below if you are currently invested in AMP New Zealand Shares Fund or AMP International Shares Fund No. 2 respectively.

Single-sector Investment Funds	\$ Amount or % of Balance From:	\$ Amount or % of Balance To:	Office use
AMP New Zealand Cash Fund			84
AMP NZ Fixed Interest Fund			35
AMP Global Fixed Interest Fund			38
ANZ Property Fund ¹			37
AMP International Shares Fund			39
AMP Australasian Shares Fund			36
AMP International Shares Fund No. 3			80
AMP Emerging Markets Fund			41
Multi-sector Investment Funds	\$ Amount or % of Balance From:	\$ Amount or % of Balance To:	
AMP Conservative Fund			42
AMP Balanced Fund			43
AMP Dynamic Fund			44
ANZ Balanced Growth Fund			68

¹Formally Property

2. If you are currently invested in the AMP New Zealand Shares Fund, you can only switch to or make additional investments into the funds listed in (1) above or (3) below if you are currently invested in that fund.

Single-sector Investment Funds	\$ Amount or % of Balance From:	\$ Amount or % of Balance To:	Office use
AMP New Zealand Shares Fund			74

3. If you are invested in the AMP International Shares Fund No. 2, you can only switch to or make additional investments into the funds listed in (1) or (2) above if you are currently invested in that fund.

Single-sector Investment Funds	\$ Amount or % of Balance From:	\$ Amount or % of Balance To:	Office use
AMP International Shares Fund No. 2			75

(c) Additional Investment details

Complete this section if you wish to make an additional investment (see tables above for a list of funds available).

Investment Fund	\$ Amount
Total	

(d) Switch details

Complete this section if you wish to switch funds from one investment fund to another (see table on previous page for a list of funds that you are able to switch to).

From Investment Fund	To Investment Fund	% of Balance to switch	or \$ Amount to switch

(e) Where do you want your future contributions to go?

Complete this section if you wish to change where your future contributions are invested. Please list all current and future investment funds, regardless of whether or not a change is being made to that particular fund (see tables on previous page for a list of funds you may contribute to).

Personal Retirement Plan Investment Fund	\$ Current amount	\$ New amount
Total		

(f) Personal Retirement Plan lock-in agreement

To be completed by existing members over the age of 50 or **whose previous lock-in has expired** and who wish to make an additional lump sum investment. Select your preferred lock-in option. Tick one box only. Where membership is joint, the conditions of age are based on the oldest member.

Option 1 – Aged over 50

- I am aged 50 or over, and agree to lock in all my funds for 5 years in return for the benefit of a tiered entry fee structure. I am still entitled to one withdrawal per calendar year, of up to 20% of the value of each plan at the time of the transaction.
- I am aged between 50 and 55, and agree to pay a flat fee of 5% on my investments in return for having full access to my funds from age 55. I understand that I am entitled to only one withdrawal per calendar year of up to 20% of my credit balance in each plan at the time of the transaction, until I reach age 55.
- I am aged 55 or over, and agree to pay a flat fee of 5% on my investments in return for having full access to my funds.

Option 2 – 100% lock-in

- I wish to forgo my entitlement to one withdrawal per calendar year. I agree that I will not be able to make any withdrawals until I reach age (minimum age 55). If the funds are locked in for less than 5 years an entry fee of 5% on investments will be payable (where entry fees apply).

Advice

Do you have an adviser?

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

Yes No

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

(g) Authorisation

Subject to any limitations or conditions set by the Supervisor, Manager or Fund Managers or arising from the Trust Deed and rules, please act on the above instructions.

Member signature

SIGN HERE

Date

D D M M Y Y Y Y

Member signature

SIGN HERE

Date

D D M M Y Y Y Y

(h) Adviser use only

Adviser name

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

AMP Adviser code

Adviser's business name

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

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

Date

D D M M 2 0 Y Y