RESET

AMP

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.

Personal Retirement Plan

Additional investment 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 disclosure statement is available from your Adviser on request and free of charge.

(a) Your personal details

Portfolio number

Title
☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other

Date of birth
D D M M Y Y Y Y

First names

Surname

^Title
☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other

^Date of birth
D D M M Y Y Y Y

^First names

^Surname

^Complete if joint membership

(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 to the funds listed under (2) or (3) below if you are an existing investor in that fund.

Single-sector Investment Funds	Multi-sector Investment Funds
NZ Cash	Conservative
NZ Fixed Interest	Balanced
Global Fixed Interest	Dynamic
Australasian Property	OnePath Balanced Plus*
Global Shares	
New Zealand Shares	
Passive International Shares (Hedged)	
Asian Shares	

*Formerly ANZ Balanced Investment Fund

2. If you are invested in the Passive NZ Shares Fund, you can only switch to or make additional investments into the funds listed in (1) above or (3) below if you have an existing investment in that/those fund/s already.

Single-sector Investment Funds	
Passive NZ Shares	

3. If you are invested in the Passive International Shares Fund, you can only switch to or make additional investments into the funds listed in (1) or (2) above if you have an existing investment in that/those fund/s already.

Single-sector Investment Funds	
Passive International Shares	

4. The funds listed in the table immediately below are scheduled to be wound-up on 31 May 2019. If you are invested in any of these funds you can switch from these funds only, no switch in or additional investments will be accepted. You can only switch to the funds listed under (2) or (3) above if you are an existing investor in that fund.

Single-sector Investment Funds	Multi-sector Investment Funds
Strategic NZ Shares	Balanced - Other
Australian Shares	Legg Mason Balanced

(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

Have you received financial advice from an Adviser on this change? Yes ☐ No ☐

If yes, please ensure your Adviser completes Section (h) on the next page.

(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.

Signature: SIGN HERE   Date: D D M M Y Y Y Y

Signature: SIGN HERE   Date: D D M M Y Y Y Y

(h) 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 a:

- [ ] 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