



RESET FORM

Please email this completed form and supporting documents to: investments@amp.co.nz or post to AMP Services (NZ) Limited, Freepost 170, PO Box 55, Shortland Street, Auckland 1140. We're here to help. If you have any questions, please contact your Adviser or call Customer Services on 0800 267 111

# Savings & Investment Portfolio (SIP)

## Transfer of ownership

Use this form to change the ownership of units within SIP Personal Retirement Plan (PRP) (where permitted for marital split transfers) from joint investors to an individual investor. It is not possible to split SIP PRP units between joint investors by creating new individual accounts. This form can be completed on-screen by typing content directly into the PDF document. Please use block letters if you're not completing this form online. Once you have completed your details, sign and email or post the form and any supporting documents to the address above.

\*These fields must be completed

### (a) Details of transfer

Portfolio number

Date of transfer

\*Transferor(s) (current owner(s) 1)

\*Transferor(s) (current owner(s) 2)

\*Address (to which confirmation will be sent)

Postcode

Email

Please provide at least one contact phone number

Home

Work phone

Mobile phone

Enter the number of units to be transferred.

Dollar amount to be transferred

Please transfer **all** of my units

Signature(s)

Date

Signature(s)

Date

## Name of witness

\*First names of witness

\*Surname of witness

\*Address of witness

Postcode

Signature(s)

Date

## \*Advice

Have you received financial advice from an Adviser in making this decision?  Yes  No  
If yes, please ensure your Adviser completes Section (c).

## (b) Transferee (new owner)

Portfolio number

\*Transferee (new owner)

\*Address (to which confirmation will be sent)

Postcode

Email

Please provide at least one contact phone number

Home

Work phone

Mobile phone

Signature

Date

