RESET

AMP A little help

AMP KiwiSaver Scheme

Changing your investment option

You can change your fund(s) online via **MyAMP**
Alternatively, please email this completed form to **kiwisaver@amp.co.nz**
or post to:
AMP KiwiSaver Scheme
Freepost 170, PO Box 55
Shortland Street, Auckland 1140

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 the current Product Disclosure Statement (PDS) and Fund Update Booklet for information about what changes you can make to your investments, the various investment options and the fees that may apply. Find the AMP KiwiSaver Scheme PDS and Fund Update Booklet on **amp.co.nz**.

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.

If you have any questions when completing this form, please contact your Adviser or call Customer Services on 0800 267 5494.

*These sections must be completed

(a) *Your personal details

*Member number:

K

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other

Date of birth

D D M M Y Y Y Y

First names

Surname

Postal address

Postcode

Email address

Please provide at least one contact phone number

Home phone

( )

Work phone

( )

Mobile phone

( )

IRD number

Prescribed Investor Rate (PIR)

☐ 10.5% ☐ 17.5% ☐ 28%

PIE tax may be deducted when your funds are switched using the information held by AMP at the time you switch. If your PIR details have changed, please advise your new PIR. To help determine your PIR, go to **amp.co.nz/PIE** or **ird.govt.nz**. If a PIR is not selected and has not been previously selected, or you supply an incorrect IRD number, the default rate of 28% will apply. Inland Revenue may also instruct AMP to apply a different PIR.

(b) *New investment instructions

You can change your investment option for both your current balance and future contributions.
Please complete both section 1 and 2 below:

1. Change your current balance as follows:

You can choose a **maximum of seven** investment options to switch your **current** balance to at any one time.

Investment option/funds	**Current balance (please enter a %)** (savings already in your AMP KiwiSaver Scheme account)
Lifesteps Investment Programme	%
AMP Defensive Conservative Fund - Closed to new investors	%
AMP Conservative Fund	%
AMP Moderate Fund	%
AMP Moderate Balanced Fund	%
AMP Balanced Fund	%
AMP Growth Fund	%
AMP Aggressive Fund	%
AMP Balanced Fund No.2[1]	%
AMP Cash Fund	%
AMP NZ Fixed Interest Fund[2]	%
AMP Global Fixed Interest Fund	%
AMP Australasian Shares Fund	%
AMP International Shares Fund	%
AMP International Shares Fund No.2[3]	%
ANZ Property Fund[4]	%
ANZ Conservative Fund	%
ANZ Balanced Growth Fund	%
ANZ Growth Fund	%
Milford Conservative Fund	%
Milford Balanced Fund	%
Milford Active Growth Fund	%
Milford Aggressive Fund	%
Mercer Balanced Fund	%
SuperLife Moderate Fund[5]	%
SuperLife Balanced Fund[6]	%
SuperLife Growth Fund[7]	%
Total	**100%**

Important notes for your current balance:

- The AMP Lifesteps Investment Programme is age-based. Please check you've provided your correct date of birth so that we can invest your funds in accordance with that date of birth.
- If you're selling the units you hold in one fund and buying units in another, PIE tax will be calculated and deducted (where appropriate) from the amount switched.
- AMP Defensive Conservative, Macquarie Global Multi Asset Fund and Macquarie Income Generator Fund are closed to new investors. You can increase or decrease your existing investment in this fund at anytime. If you do not have an existing balance in the fund you cannot choose these three funds as an investment option.

[1]Formerly AMP Ethical Balanced Fund
[2]Formerly AMP Capital NZ Fixed Interest Fund
[3]Formerly AMP Passive International Shares Fund
[4]Formerly AMP Capital Listed Property Fund
[5]Formerly ASB Moderate Fund
[6]Formerly ASB Balanced Fund
[7]Formerly ASB Growth Fund

☐ Please tick if you don't want to change your current investment option **(please complete section 2 below - 'Change my future contributions')**

2. Change my future contributions as follows:

You can choose a **maximum of seven** investment options shown below at any one time.

Investment option/funds	**Future contributions (please enter a %)** (savings you will contribute in the future)
Lifesteps Investment Programme	%
AMP Defensive Conservative Fund - Closed to new investors	%
AMP Conservative Fund	%
AMP Moderate Fund	%
AMP Moderate Balanced Fund	%
AMP Balanced Fund	%
AMP Growth Fund	%
AMP Aggressive Fund	%
AMP Balanced Fund No.2[1]	%
AMP Cash Fund	%
AMP NZ Fixed Interest Fund[2]	%
AMP Global Fixed Interest Fund	%
AMP Australasian Shares Fund	%
AMP International Shares Fund	%
AMP International Shares Fund No.2[3]	%
ANZ Property Fund[4]	%
ANZ Conservative Fund	%
ANZ Balanced Growth Fund	%
ANZ Growth Fund	%
Milford Conservative Fund	%
Milford Balanced Fund	%
Milford Active Growth Fund	%
Milford Aggressive Fund	%
Mercer Balanced Fund	%
SuperLife Moderate Fund[5]	%
SuperLife Balanced Fund[6]	%
SuperLife Growth Fund[7]	%
Total	**100%**

Important notes for future contributions:

- If you're switching 100% of your current balance above, you have the option to:

1. contribute 100% of future contributions to the fund you've switched your current balance to; or
2. contribute 100% of future contributions to another fund other than the one you've switched your current balance to; or
3. contribute any percentage you decide to the fund you've switched your current balance to and the remaining percentage (so it equals 100%) to another fund.

- If you've switched your current balance above to seven funds, you must allocate your future contributions to these seven funds. You can decide the percentage amount to allocate to each fund. This may mean you contribute 100% to one fund only if you want.
- AMP Defensive Conservative Fund, Macquarie Global Multi Asset Fund and Macquarie Income Generator Fund are closed to new investors. You can increase or decrease your existing investment in this fund at anytime. If you do not have an existing balance in the fund you cannot choose these three funds as an investment option.

You can hold an investment in a maximum of seven funds at any time.

[1]Formerly AMP Ethical Balanced Fund
[2]Formerly AMP Capital NZ Fixed Interest Fund
[3]Formerly AMP Passive International Shares Fund
[4]Formerly AMP Capital Listed Property Fund
[5]Formerly ASB Moderate Fund
[6]Formerly ASB Balanced Fund
[7]Formerly ASB Growth Fund

☐ Please tick if you don't want to change your investment option for future contributions

*Have you received financial advice from an Adviser in making this decision to change your investment?

☐ Yes ☐ No

If yes, please ensure your Adviser completes the section (d).

(c) *Your signature

To: AMP Wealth Management New Zealand Limited ("AMP")

1. I confirm that I have received, read and understood the most recent AMP KiwiSaver Product Disclosure Statement and Fund Update Booklet.
2. I understand that if AMP accepts these investment instructions, they will be implemented as soon as possible after AMP has received them, and will apply until I advise AMP otherwise.
3. I acknowledge that any fees payable will be deducted from my account.
4. I acknowledge that tax will be calculated and debited (where appropriate) at my recorded PIR and that it is my responsibility to notify AMP of my correct PIR.
5. 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.
6. I acknowledge that none of my employer, the Supervisor, the Crown, or the Manager guarantee the performance of the investment funds selected.

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's signature

SIGN HERE

Date

D D M M Y Y Y Y

If you are under the age of 18, your parent or guardian must confirm the following statement and sign below:

I/We

FULL NAME OF PARENT/GUARDIAN

confirm that I am the parent/legal guardian of the member named in section (a) and have agreed to the acknowledgements above on behalf of the member.

Signature of parent/guardian

SIGN HERE

Date

D D M M Y Y Y Y

Signature of parent/guardian

SIGN HERE

Date

D D M M Y Y Y Y

(d) For 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 Y Y Y Y

***Checklist:**

Please check you have completed the form correctly

- ☐ Have you completed all sections with an *?
- ☐ Have you completed sections 1 & 2 in section (b)?
- ☐ Have you or your parents/guardians signed (as applicable) and dated section (c)?