

## Investor Confirmation Form

If you would like help completing this form, please email [info@generatekiwisaver.co.nz](mailto:info@generatekiwisaver.co.nz) or phone us on 0800 855 322.

### Details

Title \_\_\_\_\_ First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Surname \_\_\_\_\_ Date of Birth 

D	D	M	M	Y	Y	Y	Y
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Residential Address \_\_\_\_\_

City \_\_\_\_\_ Country \_\_\_\_\_ Postcode \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Mobile \_\_\_\_\_ Email \_\_\_\_\_

Name of Adviser (Adviser) \_\_\_\_\_

I confirm that I have given consent for my Adviser to discuss KiwiSaver with me.

I confirm that I have had a copy of my Adviser's disclosure statement made available to me.

### Confirmation

I have been given a copy of the Scheme's Product Disclosure Statement to read to assist me with my assessment.

I agree that the Adviser has:

- provided information about the Generate KiwiSaver Scheme, the choice of Funds and KiwiSaver generally (without reference to my personal financial situation or goals);
- not taken into consideration my personal financial situation or goals (income or expenditure, assets, liabilities, and financial goals);
- not taken into account personalised information that the Adviser may have already known about me or have gathered from the circumstances (other than the fact that I may fit into a predefined class of people e.g. conservative or growth focused investors); and
- not commented about my home situation or drawn inferences about that situation. However, the Adviser has explained to me that if I am planning to use the first home withdrawal facility or if I retire within the next three years, that I should consider selecting the Conservative Fund.

If I am already a KiwiSaver scheme member, I am switching schemes by making this application to Generate. I have been advised generically on the potential consequences and process involved when transferring schemes.

Investor Signature \_\_\_\_\_

Date: 

D	D	M	M	Y	Y	Y	Y
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If you would like more in depth advice taking into account your personal financial situation or goals (including analysing your income, expenditure, assets and liabilities), please ask your Adviser.