

Changing your Investment Options Form

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

Please use this form if you are an existing Generate KiwiSaver Scheme member and wish to change your investment strategy. If you are unsure about choosing an investment strategy, you may wish to seek advice from a financial adviser.

Member Details

Title	First Name	Surname
Date of Birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	
Postal Address		
City	Country	Postcode
Home Phone	Work Phone	
Mobile	Email	
Generate KiwiSaver Member Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	IRD No. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

If you don't know your IRD number, please call the IRD on 0800 227 774.

Changing your Investment Options

I wish to make the following changes to my Scheme account:

- Existing balances only
- Future contributions only
- Both existing balances and future contributions

(Please tick one)

- Stepping stones option;
- Stepping stones growth option; or
- A combination of the following funds:

%	Focused Growth Fund
%	Growth Fund
%	Conservative Fund
100%	Total (must add to 100%)

Authorisation

- I understand that any change requested will be implemented as soon as practicable after receipt of this completed form.
- I understand that choosing an investment strategy is solely my responsibility, and neither Generate nor the Trustee of the Scheme is to be regarded as representing or implying that any particular investment strategy is appropriate for my personal circumstances. I acknowledge that I have made this request of my own volition.
- I acknowledge that my choice of an investment strategy is a binding direction from me to the Trustee of the Scheme for Trustee Act 1956 purposes, and that neither the Trustee nor the Manager of the Scheme will be liable to me for any loss as a consequence of this investment direction.
- I acknowledge that none of my employer, Generate, the Trustee, the Crown or any other person guarantees the performance of the investment fund or funds selected.

Declaration

I have read the current Product Disclosure Statement for the Scheme.

- I understand my rights, benefits and obligations as a Scheme member, that the Scheme is a vehicle for long-term investment and that the value of my investment is liable to fluctuations and may rise and fall from time to time.

Signature* _____ Date _____

*For a member aged below 16, this form must be signed not by the member but by a legal guardian of the member. Members aged 16 or over may exercise membership-related discretions themselves.

Where do I send my application to?

Email return: Please scan this application and all supporting documentation and email them to us at info@generatekiwisaver.co.nz or

Postal return: Please send this application and any supporting documentation to: Generate KiwiSaver Scheme, PO Box 91609, Victoria Street West, Auckland 1142