

Changing your Investment Strategy 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 KiwiSaver adviser.

The value of the investment will fluctuate based on the unit price(s) which applies when the switch is processed.

Member Details

Title

First Name

Middle Name

Surname

Date of Birth

D

D

M

M

Y

Y

Y

Y

Residential Address

City

Country

Postcode

Home Phone

Work Phone

Mobile

Email

Generate KiwiSaver Member Number

G

E

N

IRD No.

If you don't know your IRD number, please call the IRD on 0800 227 774 or visit ird.govt.nz/tasks/find-my-ird-number

Changing your Investment Options

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

☐ Existing balances only

☐ Future contributions only

☐ Both existing balances and future contributions

Please tick one

☐ Stepping Stones option; **or**

☐ Stepping Stones growth option; **or**

☐ A combination of the following funds:

☐ CashPlus

%

☐ Conservative

%

☐ Moderate

%

☐ Balanced

%

☐ Growth

%

☐ Focused Growth

%

☐ Australasian

%

☐ Thematic

%

☐ Global

%

Total (must add to 100%)

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 Supervisor 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 Supervisor of the Scheme for Trusts Act 2019 purposes, and that neither the Supervisor 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 Supervisor, 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:

D

D

M

M

Y

Y

Y

Y

* 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 to send this form

Email return: Please scan this completed form and email it to us at info@generatekiwisaver.co.nz **or**
Postal return: Please send this completed form to: Generate Investment Management Limited, PO Box 91609, Victoria Street West, Auckland 1142

1