

Lump Sum Contribution Form

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

Use this form to make a lump sum contribution to your Generate KiwiSaver account.

Member Details

Full legal name _____

Date of Birth

D	D	M	M	Y	Y	Y	Y
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IRD No.

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

Residential address _____

City _____ Country _____ Postcode _____

Home Phone _____ Work Phone _____

Mobile _____ Email _____

Generate KiwiSaver Member Number

G	E	N							
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Lump Sum Contribution

I intend to deposit I have deposited \$ _____ into the scheme bank account.

Please invest this voluntary contribution

as per my current investment strategy

as per the following:

<input type="checkbox"/> Focused Growth	%
<input type="checkbox"/> Growth	%
<input type="checkbox"/> Balanced	%
<input type="checkbox"/> Moderate	%
<input type="checkbox"/> Conservative	%
<input type="checkbox"/> Defensive	%
<hr style="width: 80%; margin-left: 0;"/>	
Total (must add to 100%)	100%

AML / CFT Requirements

We are required to collect additional information relating to the source and/or wealth of funds under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 before we can accept your deposit.

What is your current occupation? If you do not work, please state your position, e.g. retired, student, unemployed _____

What annual income bracket applies to you?

- | | | | |
|--|--|--|--|
| <input type="checkbox"/> Under \$30,000 | <input type="checkbox"/> \$30,000 – \$40,000 | <input type="checkbox"/> \$40,000 – \$50,000 | <input type="checkbox"/> \$50,000 – \$60,000 |
| <input type="checkbox"/> \$60,000 – \$70,000 | <input type="checkbox"/> \$70,000 – \$80,000 | <input type="checkbox"/> \$80,000 – \$90,000 | <input type="checkbox"/> \$90,000 or more |

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Other Requirements (continued)

Please select the most appropriate source of these funds.

Please also attach appropriate documentation as evidence of this e.g. bank statements, Sales and purchase agreement, Term deposit maturity letters, etc.

- | | | |
|---|--|--|
| <input type="checkbox"/> Compensation payment | <input type="checkbox"/> Money from existing Trust | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Inheritance | <input type="checkbox"/> Divorce settlement | <input type="checkbox"/> Gift |
| <input type="checkbox"/> Salary/bonus | <input type="checkbox"/> Lottery/betting win | <input type="checkbox"/> Policy claim/maturity |
| <input type="checkbox"/> Sale of company | <input type="checkbox"/> Sale of investments | <input type="checkbox"/> Sale of property |
| <input type="checkbox"/> Other (please provide details below) | | |

Acknowledgement

I understand that this voluntary contribution to my KiwiSaver balance will be:

- invested in the investment option(s) I have selected (if applicable); and
- the contributions will be allocated as soon as practicable after receiving this completed form and required supporting evidence.

Signature

Electronic signatures are only acceptable accompanied with a verified audit trail

Date:

D	D	M	M	Y	Y	Y	Y
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Checklist

I have:

- Completed all sections of the form
- Provided supporting documents to evidence source of funds / wealth

Where to send this form

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

Postal return: Please send this completed form and all supporting documentation to:
Generate Investment Management Limited, PO Box 91609, Victoria Street West, Auckland 1142

Should you have any questions or require any help in completing this form, please call us on 0800 855 322.

The information in this form is being collected for the purposes of effectively managing your investment and it will be held by Generate Investment Management Limited. It may be disclosed to third parties to the extent that it is necessary to administer your application and any withdrawals from the Scheme.

You can ask to see the personal information that Generate holds about you by calling us on 0800 855 322.