

Changing Your Investment Options Form

This Form is for existing Fisher Funds KiwiSaver Scheme investors only. Before completing this form you should refer to the latest Investment Statement for the Scheme (to which this form is attached) to see what changes you can make to your investments and for details about the investment options.

If you are unsure about choosing an investment strategy, you may wish to seek advice from a financial adviser.

Please send this form to: Fisher Funds KiwiSaver Scheme, c/o Trustees Executors, PO Box 409, Wellington, 6140.

If you have not previously provided proof of identity then you will need to do so as outlined in the Application Form.

Your details

Title	First names	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address	Suburb	
<input type="text"/>	<input type="text"/>	
Town/city	Postcode	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home phone	Business phone	Mobile
() <input type="text"/>	() <input type="text"/>	() <input type="text"/>
IRD no.	Fisher Funds KiwiSaver Scheme Member No.	
<input type="text"/>	<input type="text"/> F <input type="text"/> I <input type="text"/>	

Changing your investment options

Please make the following changes to my Scheme investment strategy:

A Invest the total value of my current investment in the Fund(s) indicated in column A below

B Invest all future contributions to the Scheme for my benefit in the Fund(s) as indicated in column B below

Funds	A - Current Scheme savings <i>(The money already in my KiwiSaver Account)</i>	B - Future contributions <i>(The money I will pay in the future)</i>
Conservative Fund	%	%
Growth Fund	%	%
The total must equal 100%	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 Fisher Funds 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, Fisher Funds, the Trustee, the Crown or any other person guarantees the performance of the investment fund or funds selected.

Declaration

- » I have read the current Investment 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
<input type="text"/>	<input type="text"/>

*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.