

# KiwiSaver Investment Switch Form



If you would like help in completing this form, please email [kiwisaver@fisherfunds.co.nz](mailto:kiwisaver@fisherfunds.co.nz) or phone us on **0800 FF KIWI (0800 335 494)**.

If completing this form on-screen, you can type content directly into the PDF document. Once you have completed your details, please print, sign and post the form to **Fisher Funds, C/- Trustees Executors, PO Box 409, Wellington 6140** or email to [kiwisaver@fisherfunds.co.nz](mailto:kiwisaver@fisherfunds.co.nz).

## Who should complete this form?

This form is for existing Fisher Funds KiwiSaver Scheme investors only. Before completing this form you should refer to the latest product disclosure statement for the Scheme to see what changes you can make to your investments and for details about the investment options and the fees that may apply.

If you are unsure about choosing an investment strategy, you can complete our investor profile questionnaire to help you work out what type of investor you are and suggest an investment strategy that might suit your needs. You can find the investor profile questionnaire on our website at <https://kiwisaver.fisherfunds.co.nz/ipq>.

## Section 1: Your Details

Title	First Name/s	
<input type="text"/>	<input type="text"/>	
Surname		
<input type="text"/>		
Fisher Funds KiwiSaver Scheme Account No.	Date of Birth (please reconfirm for security purposes)	
<input type="text"/> F <input type="text"/> I <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
Postal Address		
<input type="text"/>		
City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone	Work Phone	Mobile
<input type="text"/> ( <input type="text"/> )	<input type="text"/> ( <input type="text"/> )	<input type="text"/> ( <input type="text"/> )
Email Address		
<input type="text"/>		

**Note: We will update your account with the contact details you provide above.**

## Section 2: Investment Switch Details

Please tell us what you would like to change. Choose one option below:

### OPTION 1 — GlidePath

I want to invest all of my KiwiSaver account balance in GlidePath

### OPTION 2 — I want the **same investment strategy** for my existing balance and future contributions

Please select one strategy or build your own strategy you want both your existing balance and future contributions invested in.

#### Select an investment strategy

Conservative strategy (100% Conservative Fund)

Balanced strategy \* (currently 45% Conservative Fund, 55% Growth Fund)

Growth strategy (100% Growth Fund)

#### Build your own investment strategy

Conservative Fund

 %

Growth Fund

 %

**Total must equal to 100%**

 %

*\*Your investment in the Balanced Strategy is rebalanced annually to a target fund mix determined by us, within a range of 40% to 50% Conservative Fund and 50% to 60% Growth Fund.*

### OPTION 3 — I want **different investment strategies** for my existing balance and future contributions. Your investment will not be automatically rebalanced.

#### Build your own investment strategy

#### Existing Balance

#### Future Contributions

Conservative Fund

 % %

Growth Fund

 % %

**Total must equal to 100%**

 % %

## Section 3: Authorisation and Declaration

I hereby request Fisher Funds to direct future investments and/or transfer my current investments in accordance with my instructions in this form and declare that:

- I am authorised to make investment decisions for this account
- I have read the current [Fisher Funds KiwiSaver Scheme Product Disclosure Statement](#)
- I understand that any change requested will be implemented as soon as practicable after receipt of this request
- I understand that the value of my investments upon withdrawal from any fund, and investment or reinvestment into any fund will be based on the unit price which applies when the transaction is processed and that any fees, taxes and expenses may be deducted from my account.
- If I am invested in the Balanced Strategy I authorise Fisher Funds to rebalance my target fund mix to within a range of 40% to 50% Conservative Fund and 50% to 60% Growth Fund on an annual basis.

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.*