

# FuturePlan Investment Switch

If you would like help in completing the form, please email [yourplan@fisherfunds.co.nz](mailto:yourplan@fisherfunds.co.nz) or phone us on **0508 FISHER (0508 347 437)**

You can complete this form on-screen by typing directly into each field. Once you have completed your details, please print, sign and post the form to **Fisher Funds, Private Bag 93502, Takapuna, Auckland 0740** or email to [yourplan@fisherfunds.co.nz](mailto:yourplan@fisherfunds.co.nz).

## Who should complete this form?

Complete this form if you wish to change your FuturePlan investment strategy. If you are unsure about choosing an investment strategy, please seek advice from your financial adviser.

## Section 1 – Account details

Account number

       

Investor 1

Title	First name and middle name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact phone	Email address
<input type="text" value="( )"/>	<input type="text"/>

Address

City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

IRD number

## Investor 2

Title	First name and middle name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact phone	Email address	
<input type="text"/>	<input type="text"/>	
Address		
<input type="text"/>		
City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
IRD 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"/>		

## Section 2 – Adviser details

Did you talk to a financial adviser about this withdrawal?

No (please go to Section 3)  Yes (please provide the adviser's details)

Adviser name	Company name
<input type="text"/>	<input type="text"/>

## Section 3 – Changing your investment

Select all that apply:

- Change the investment strategy for your future contributions only
- Change the investment strategy for your current account balance only
- Change the investment strategy for **both** your contributions and your current account balance

Please show percentages in whole numbers and ensure that this totals 100%

Investment fund	Future contributions	Current account balance
Capital Protected Fund	<input type="text"/> %	<input type="text"/> %
Balanced Fund	<input type="text"/> %	<input type="text"/> %
Growth Fund	<input type="text"/> %	<input type="text"/> %
International Companies Fund	<input type="text"/> %	<input type="text"/> %
Trans Tasman Equity Fund	<input type="text"/> %	<input type="text"/> %
<b>Total must equal to 100%</b>	<input type="text"/> %	<input type="text"/> %

## Section 4 – 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 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.

Name

Signature

Date

Name

Signature

Date

In the case of a joint account, both must sign.