

Fisher Funds KiwiSaver Plan Fund Switch Form

If you would like help in completing this form, please email enquiries@fisherfunds.co.nz or phone us on **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 KiwiSaver Plan, Private Bag 93502, Takapuna, Auckland 0740**, send by courier to **Fisher Funds Management Limited, Crown Centre, 67-73 Hurstmere Road, Takapuna, Auckland 0622**, or email to enquiries@fisherfunds.co.nz.

Who should complete this form?

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

If you are unsure about which investment fund(s) are right for you, you may wish to seek advice from a financial adviser. Alternatively, you can log in to Fisher Funds Online and complete our investor profile questionnaire to help you work out what type of investor you are and it will suggest an investment fund that might suit your needs.

Important note: the CashPlus Fund closed to new investors on 1 April 2019. If you are an existing investor in the CashPlus Fund and you make a full switch to another fund, you will not be able to switch back to the CashPlus Fund.

Section 1 – Your details

Title	First name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Account number (if known, e.g. KP123456)	Date of birth	
<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"/>	<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	Business 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

Both your current Fisher Funds KiwiSaver Plan account balance and your future contributions will be invested as per this instruction.

Simply complete the table below. Please show the percentages as whole numbers and 5% increments and ensure that this totals to 100%. If your allocation does not meet this criteria we will be unable to process your request and we will contact you to seek clarification of your instruction.

Cash Fund	<input type="text"/> %
CashPlus Fund*	<input type="text"/> %
Default Conservative Fund	<input type="text"/> %
Conservative Fund	<input type="text"/> %
Default Fund	<input type="text"/> %
Balanced Fund	<input type="text"/> %
Growth Fund	<input type="text"/> %
Total must equal to 100%	<input type="text"/> %

*Only available for members who are currently invested in the CashPlus Fund.

Section 3 – Authorisation and declaration

I hereby request Fisher Funds to direct future contributions and switch 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 Plan Product Disclosure Statement
- I understand that any change requested will be implemented as soon as practicable after receipt of this request. If your allocation does not meet this criteria we will be unable to process your 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.

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.