

# Fisher Funds LifeSaver Plan Investment Switch

If you would like help in completing the form, please phone us on **0508 FISHER (0508 347 437)**, if calling from overseas **+64 9 445 3377**.

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 Management Limited, Private Bag 93502, Takapuna, Auckland 0740, New Zealand** or email to **lifesaver@fisherfunds.co.nz**.

## Who should complete this form?

This form is for existing Fisher Funds LifeSaver Plan investors only. Before completing this form you should refer to the latest product disclosure statement to see what changes you can make to your investments and for a description of your investment options.

If you are unsure about choosing an investment strategy, you may wish to seek advice from a financial adviser or complete our Investor Profile Questionnaire at [ipq.fisherfunds.co.nz/ffls-advice](http://ipq.fisherfunds.co.nz/ffls-advice).

## Section 1 – Member details

**Important note: If you have more than one LifeSaver account type (e.g. Member Account, Voluntary Account, Employer Account) your investment switch will apply to all of your account types.**

Member number	Employer	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"/> / <input type="text"/>
Title	First name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
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"/>		

## Section 2 – Investment switch details

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

### Option 1 – 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 (100% Balanced Fund)

Growth strategy (100% Growth Fund)

**Build your own investment strategy**

LifeSaver Preservation Fund

LifeSaver New Zealand Fixed Income Fund

LifeSaver Conservative Fund

LifeSaver Balanced Fund

LifeSaver Growth Fund

LifeSaver Equity Fund

LifeSaver Trans Tasman Equity Fund

**Total must equal to 100%**

### Option 2 – I want different investment strategies for my existing balance and future contributions.

#### Select an investment strategy

Conservative strategy (100% Conservative Fund)

#### Future contributions

Balanced strategy (100% Balanced Fund)



Growth strategy (100% Growth Fund)



#### Build your own investment strategy

LifeSaver Preservation Fund



LifeSaver New Zealand Fixed Income Fund



LifeSaver Conservative Fund



LifeSaver Balanced Fund



LifeSaver Growth Fund



LifeSaver Equity Fund



LifeSaver Trans Tasman Equity 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 LifeSaver 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.
- I understand that if I have more than one LifeSaver account type (e.g. Member Account, Voluntary Account, Employer Account), the investments in all of my account types will be switched.

Signature of member

Date