

# Fisher Funds LifeSaver Plan Investment Switch Form

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, Freepost 521, PO Box 1849, Wellington 6140, New Zealand** or email to **lifesaver@fisherfunds.co.nz**.

## Who should complete this form?

This form is for existing Fisher Funds 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 details about the investment options. If you have not previously provided proof of identity then you will need to do so as outlined in the latest product disclosure statement.

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

## Section 1: Member Details

Member Number










Employer

Date of Birth

 /  / 

Title First Name/s

Surname

Address

City

Country

Postcode

Home Phone

 (  ) 

Work Phone

 (  ) 

Mobile

 (  ) 

Email Address

## Section 2: Investment Strategy

Only complete this section if you wish to alter your current investment choices. Investors who have joined LifeSaver through their Employer Scheme can only select the investment funds that have been made available to them. Refer to the product disclosure statement and employer supplement (*if applicable*) for the funds available.

### Select all that apply:

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

### OPTION 1 - Select an investment strategy

Please tick the relevant box below:

	Future Contributions	Current Account Balance
Conservative strategy (100% Conservative Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Balanced strategy (100% Balanced Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Growth strategy (100% Growth Fund)	<input type="checkbox"/>	<input type="checkbox"/>

### OPTION 2 - Build your own investment strategy

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

	Future Contributions	Current Account Balance
LifeSaver Preservation Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver New Zealand Fixed Income Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver Conservative Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver Balanced Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver Growth Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver Equity Fund	<input type="text"/> %	<input type="text"/> %
LifeSaver Trans Tasman Equity Fund	<input type="text"/> %	<input type="text"/> %
<b>Total (must equal 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 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.

Signature of Member

Date

 /  /