

Fisher Funds LifeSaver Plan Amendment Request Form

Please return this form to **Fisher Funds Management Limited, Freepost 521, PO Box 1849, Wellington 6140, New Zealand.**

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**.

Who should complete this form?

Please complete this form if you wish to:

- Change your Prescribed Investor Rate (PIR) - complete sections 1 and 4
- Change your contribution amount and/or frequency - complete sections 1, 2 and 4
- Make a lump sum contribution or transfer from another investment - complete sections 1, 2 and 4
- Change your investment strategy - complete sections 1, 3 and 4

Section 1: Member Details

Member Number

Employer

Date of Birth

 / /

Prescribed Investor Rate (PIR) (please tick one).

 10.5% 17.5% 28%

To work out your PIR, or for more information, visit www.fisherfunds.co.nz/pircalculator or call us on 0508 347 437.

Title

First Name/s

Surname

Address

City

Country

Postcode

Home Phone

 ()

Work Phone

 ()

Mobile

 ()

Email Address

Section 2: Contributions

If you've joined LifeSaver through your employer's LifeSaver workplace superannuation scheme and you wish to change your percentage contribution, please contact your employer otherwise please complete the information below.

New Dollar Amount

Start Date

Frequency of Contribution

Fortnightly

Monthly

Lump Sum Contribution

Please invest my lump sum contribution in my Fisher Funds LifeSaver Plan account.

Amount to Invest

Payment Method (please tick)

Cheque

The cheque attached is made payable to the Fisher Funds LifeSaver Plan. Send this form together with your cheque to: Fisher Funds Management Limited, Freepost 521, PO Box 1849, Wellington 6140.

Direct Credit

Payment was direct credited to the following bank account on

Account Name

Fisher Funds LifeSaver Plan

Account Number

0	3	0	1	0	4	0	1	8	8	4	5	8	0	0	0
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Bank

Branch

Account Number

Suffix

Note: Please include your reference details with your payment. Information to be included is your surname, initials and your member number. Failure to supply correct reference details will result in a delay in crediting your payment to your Fisher Funds LifeSaver Plan Account.

Transfer from another investment

If you wish to add to your Fisher Funds LifeSaver Plan account by transferring from another investment, please complete the transfer details below. Please contact your existing fund manager as there may be forms you need to complete to transfer your investment.

Transfer all Funds

Other (amount to transfer) \$

Please provide details as to where your funds will be transferred from:

Fund Manager	Product Name	Account Plan / Number

Please Invest my Lump Sum Contribution Using (tick one)

My existing investment strategy

The investment options I have nominated in Section 3

Section 3: Investment Strategy

Please refer to the Investment Statement and supplement (if applicable). Only complete this section if you wish to alter your current investment choices. Investors who have joined LifeSaver through their Employer's LifeSaver scheme can only select the investment funds that have been made available to them. Refer to the Investment Statement and supplement (if applicable) for the investment funds available.

Select all that apply:

- Please change the investment fund(s) for my future contributions only
- Please change the investment fund(s) for my existing balances only
- Please change the investment fund(s) for **both** my future contributions and my existing balances

OPTION 1 - Select an investment strategy

Please tick the relevant box below:

	Future Contributions	Existing Balances
Preservation strategy (100% Preservation Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Conservative strategy (100% Conservative Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Conservative Balanced strategy (50% Conservative Fund, 50% Balanced Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Balanced strategy (100% Balanced Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Balanced Growth strategy (40% Balanced Fund, 60% Growth Fund)	<input type="checkbox"/>	<input type="checkbox"/>
Growth Equity strategy (40% Growth Fund, 60% Equity 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	Existing Balances
LifeSaver Preservation Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver New Zealand Fixed Income Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver Conservative Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver Balanced Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver Growth Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver Equity Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
LifeSaver Trans Tasman Equity Fund	<input type="text" value=""/> %	<input type="text" value=""/> %
Totals must equal 100%	<input type="text" value="100%"/>	<input type="text" value="100%"/>

Section 4: Authorisation

I hereby authorise Fisher Funds to make changes in accordance with my instructions on this form.

Signature of Member

Date

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