

Change of Fund Form



Use this form to change the fund/s you are invested in. For more information about our available fund options, visit our website www.supereasy.co.nz or contact us.

It can take us up to three weeks to process the change of investment fund/s. The change will be backdated to the date this form is received. Once completed we will send you out a letter confirming the change.

What's next?

Once completed, scan and email this form to admin@supereasy.co.nz or post to:

Any Questions?

If you have any questions please contact us on 04 978 1250 or at admin@supereasy.co.nz

SuperEasy
PO Box 5521
Wellington 6140

A. Personal Details

SuperEasy KiwiSaver Superannuation Scheme membership number (if applicable):

Local Government Superannuation Scheme (SuperEasy) membership number (if applicable):

Please provide the membership numbers for the Scheme/s which you wish this Change of Fund to apply to. If you are a member of both Schemes and you want your new investment selection to apply to both, you must detail both membership numbers.

Name	First name(s)	Surname		
Home address	Number & street	Suburb	Town/city	Postcode
Postal address <small>(if different to above)</small>	Number & street	Suburb	Town/city	Postcode
Phone	Home	Mobile		
Email address	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>

B. Elected Investment Fund/s

I elect to invest my current balance and future contributions as follows:

Automatic Fund	<input type="text"/>	%
Aggressive Fund	<input type="text"/>	%
Growth Fund	<input type="text"/>	%
Balanced Fund	<input type="text"/>	%
Conservative Fund	<input type="text"/>	%

This must total 100%. You can invest in as many funds as you like, however the minimum that can be invested in a fund is 20%. If you don't select a fund, or if your percentage allocated totals less than 100%, the full or remaining amount will be allocated to the Automatic Fund.

Total: 100%

I only wish to invest my future contributions in the above fund/s. This means your accumulated funds will not be switched.

C. Acknowledgements

By signing this form you acknowledge that:

- you have read and understood the Privacy Statement in **Section D** of this form
- the information provided in this form is true and correct, and will be used to update your membership information

Date

! If you are aged 15 or younger, a parent or legal guardian will need to sign this form below on your behalf

By signing this form on behalf of the member you acknowledge that:

- you are a parent/legal guardian of the person detailed in **Section A** of this form
- you have read and understood the Privacy Statement in **Section D** of this form
- the information provided in this form is true and correct to the best of your knowledge, and will be used to update the membership information of the person detailed in **Section A** of this form

Signature
(of parent or legal guardian)

Date

D. Privacy Statement

The personal information you have provided in this Form, or that you provide in the future, will be collected and held by Civic Financial Services Limited as Administration Manager for purposes of marketing, operation and management of the Local Government Superannuation Scheme and SuperEasy KiwiSaver Superannuation Scheme, and compliance with any laws, rules and regulations in New Zealand, or in any other country, including the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 and the Common Reporting Standard for the Automatic Exchange of Information as it applies in New Zealand.

Your personal information may be disclosed to the following:

- Inland Revenue (who may share the information with overseas tax authorities under intergovernmental agreements to exchange financial account information)
- your employer
- Financial Markets Authority
- any other persons or entity

where it is relevant to do so for the purposes set out above.

If you do not provide some or all of the information requested in this form, we may not be able to accept your application.

You have the right to know what personal information the Local Government Superannuation Scheme's and SuperEasy KiwiSaver Superannuation Scheme's Administration Manager is holding in respect of you. Pertinent details will be shown on your Member Statements. You also have the right to request that we correct your personal details if they are wrong. You can do this by contacting the Administration Manager at: Civic Financial Services Limited, PO Box 5521, Wellington 6140. Any update to your personal information may be used to update other information the Administration Manager holds for you.

Office use only

<p>Accepted (For and on behalf of the Trustee)</p>
--

Date accepted

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---