

# Westpac NZ Staff Superannuation Scheme Investment Fund Change Request

Please complete this form if you would like to change your investment fund(s) for your:

- existing accounts; and/or
- future contributions.

## Your Details

Mr  Mrs  Miss  Ms

Other (please specify) \_\_\_\_\_

Given name(s) \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth (DD / MM / YYYY) \_\_\_\_\_

Westpac Staff Number

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## Postal Address

Number and street/box number \_\_\_\_\_

Suburb \_\_\_\_\_

Town/City \_\_\_\_\_

Postcode \_\_\_\_\_

Email address\* \_\_\_\_\_

\*As you may be contacted by email you must advise an email address that is confidential and cannot be accessed by anyone other than you. If you do not have a confidential email address, please leave this blank. By providing your email address, you are consenting to receiving information about the Scheme, including the annual report, electronically. Should you not wish to receive such information electronically, or should your email address change, you undertake to advise the Scheme's administration manager whose contact details are in the "Combined Other Material Information" document available at [www.westpacnzstaffsuper.co.nz](http://www.westpacnzstaffsuper.co.nz).

I wish to reallocate my **Existing Account Balances** (please tick one):  Yes  No

If you have answered yes above please complete the following.

1) I wish to reallocate the accumulated amounts in my Member Account and any Company Account and Incentive Account (all my accumulated amounts) to the following investment funds in the proportions indicated to the right (total percentages must add up to 100% and must be in whole percentages only):

2) I wish for this change to take effect from / / (DD / MM / YYYY)

OR  the date this request is received and processed.

(Investment fund change requests are processed on Fridays. This means that if your request is received prior to 5pm on Thursday, it will be processed the Friday of that week. Requests received after 5pm on Thursday will be processed on the following Friday.

If you have specified an effective date for your investment fund change, your change request will be processed on the nearest upcoming Friday corresponding to the date, or the relevant Friday corresponding to when your change request is received and processed - whichever is later.)

## Reallocate Existing Balances

Fund	Percentage (%)
Defensive Fund	%
Moderate Balanced Fund	%
Growth Fund	%
High Growth Fund	%
Cash Fund	%
<b>TOTAL</b>	<b>100%</b>

Please note if the above is not correctly completed your election will not be actioned.



**AND / OR**

I wish to reallocate my **Future Contributions** (please tick one):  Yes  No

**If you have answered yes above please complete the following.**

1) I wish to reallocate my future member contributions and any employer contributions to the following investment funds in the proportions indicated to the right (total percentages must add up to 100% and must be in whole percentages only):

2) I wish for this change to take effect from / / (DD / MM / YYYY)

OR  the date this request is received and processed.

(Investment fund change requests are processed on Fridays. This means that if your request is received prior to 5pm on Thursday, it will be processed the Friday of that week. Requests received after 5pm on Thursday will be processed on the following Friday.

If you have specified an effective date for your investment fund change, your change request will be processed on the nearest upcoming Friday corresponding to the date, or the relevant Friday corresponding to when your change request is received and processed - whichever is later.)

**Reallocate Future Contributions**

Fund	Percentage (%)
Defensive Fund	%
Moderate Balanced Fund	%
Growth Fund	%
High Growth Fund	%
Cash Fund	%
<b>TOTAL</b>	<b>100%</b>

**Please note if the above is not correctly completed your election will not be actioned.**

**Please sign and date this form**

I acknowledge that:

- my change will take effect from the nearest upcoming Friday corresponding to the date I have specified above, or the relevant Friday corresponding to when this request is received and processed, whichever is later (and I have read and understood the information above in this form on when change requests are processed); and
- the current Product Disclosure Statement and the latest fund updates for In-Tandem are available at **westpacnzstaffsuper.co.nz**, and I have had an opportunity to review them; and
- the alteration to my investment can be made at any time during the Scheme year (1 July to 30 June). I may alter my investment for free twice in each Scheme year, and any further alterations in the Scheme year will be subject to an administration charge (as disclosed in the Product Disclosure Statement), and the administration charge will be deducted automatically from the existing balance in my Member Account; and
- the total of my existing account balances and/or future contributions and employer contributions will be reallocated as specified by me as above in this form.

Signature \_\_\_\_\_ Date (DD / MM / YYYY) \_\_\_\_\_

Once completed, please send this application form to:

**The Scheme Administrator,  
Westpac NZ Staff Superannuation Scheme  
c/- Mercer (N.Z.) Limited  
PO Box 1849  
Wellington 6140  
New Zealand**

Or by email to **westpacstaffsuper@mercero.com**

Once received, you will receive written confirmation that your election has been recorded.