



# Change in client details

Complete only the relevant sections and return to New Zealand Funds Management Limited, Private Bag 92226, Auckland 1142  
The changes notified here will be implemented to all investments held by the named account.  
Please print in BLOCK letters and complete all fields unless not applicable.

## Client details

**Account name**

Title (Mr / Mrs / Miss / Ms / Dr / Trust / Company)

**NZ Funds client number**

## Change in contact details

**New address**

Street/PO Box

Suburb

City

Postcode

**New phone number(s)**

 ( ) ( )

Mobile

Home

Business

**Current address**

Street/PO Box

Suburb

City

Postcode

**New email address**

If you supply an email address, we will send you information pertaining to your investment with us by electronic means. We suggest using your personal rather than work email address as this is less likely to change over time.

## Change in bank details

Please attach supporting documentation.

Bank

Branch

Account name

Bank

Branch

Account number

Suffix

## Regular contribution details





Please cancel all existing regular contribution instructions.

**Note:** If you wish to add new or amend existing regular contributions, please complete a Switch Application Form from the NZ Funds Managed Portfolio Service Product Disclosure Statement.

## Regular withdrawal details

Your regular withdrawals will continue until otherwise advised.

Please note that regular withdrawals are permitted only from the following Portfolios.

Category	Portfolio	Notice period	Frequency*	Amount	Start date**
 Cash	Core Cash Portfolio	None	<input type="text"/>	\$ <input type="text"/>	<input type="text" value="DD / MM / YYYY"/>
 Income	Core Income Portfolio	63 days	<input type="text"/>	\$ <input type="text"/>	<input type="text" value="DD / MM / YYYY"/>
	Global Income Portfolio	63 days	<input type="text"/>	\$ <input type="text"/>	<input type="text" value="DD / MM / YYYY"/>

\* Frequency periods for regular withdrawals are monthly or quarterly.

\*\* Please note that withdrawal notice periods will apply before the first regular withdrawal payment commences, with proceeds paid to your nominated bank account within four business days following. For more details, please refer to the section headed 'Withdrawing investments' in the NZ Funds Managed Portfolio Service Product Disclosure Statement.

## Client signature(s)

I/we understand that this change of details for my Managed Portfolio Service account will be implemented as soon as practicable after NZ Funds receives the completed form.

Where there is more than one individual associated with the account, all individuals must sign below.

Individual 1 / Director / Trustee

Date

Individual 2 / Director / Trustee

Date

Individual 3 / Director / Trustee

Date

**Privacy Act:** This statement relates to the personal information that you are providing or may have previously provided to New Zealand Funds Management Limited (NZ Funds) and to any personal information which you may provide in the future in connection with your investment managed by NZ Funds. The personal information you have supplied may be used by NZ Funds, and Corporate Trust Limited (the Trustee of your investment) and their related entities, for the purposes of enabling NZ Funds to arrange and manage your investment and to contact you in relation to your investment. NZ Funds may also use that information to provide you with information about other investment products. NZ Funds will provide you (on request) with the name and address of any entity to which information has been disclosed. You have the right to access all personal information held about you by NZ Funds. If any of the information is incorrect, you have the right to have it corrected.