

Use it to:

- Change your KiwiSaver fund(s).
- You can choose to switch your current balance and/or your future contributions.

How long will the switch take?

Generally, fund switches are processed within two business days after we have received your fully completed application. Any fund switches will use the unit prices applicable on the day of processing. Changes may take up to five business days to show in Westpac One® online banking.

How do I apply?

1. Complete all sections of this form.
2. Once completed, send us your form to:

Email: KiwiSaver_Changes@westpac.co.nz

Post: Westpac KiwiSaver Scheme, PO Box 695, Wellington 6140

Visit: Any Westpac branch

Need help?

If you need help completing this form, call **0508 972 254** (+64 9 375 9978 from overseas) weekdays between 8.30am and 5pm.

Alternatively, email us at kiwisaverhelp@westpac.co.nz

Top tips

- The easiest way to change your fund is in Westpac One® online banking. If you need help getting set up, call **0508 972 254** or go into your local branch.
- If you haven't already, check which fund is right for you with the Westpac KiwiSaver Scheme Fund Chooser in online banking or at westpac.co.nz/fundchooser
- Alternatively, view all funds at westpac.co.nz/funds or in the Product Disclosure Statement at westpac.co.nz
- If you'd like to update your details, please complete the Change of details form - go to westpac.co.nz/kiwisaver/forms or visit your local Westpac branch.

Privacy statement

The personal information which you provide in (or in connection with) this form will be held securely by BT Funds Management (NZ) Limited (Manager) and/or The New Zealand Guardian Trust Company Limited (Supervisor), at the address of the Manager and/or Trustees Executors Limited (the registry provider), and may also be disclosed to Westpac Banking Corporation ABN 33 007 457 141 (Westpac), Westpac New Zealand Limited (Westpac NZ) and any other entity that is involved in the administration and management of the Westpac KiwiSaver Scheme (including Inland Revenue and any regulatory body). You have the right to access and correct this information subject to the provisions of the Privacy Act 2020. Your personal information may otherwise be collected, used and disclosed in accordance with Westpac NZ's Privacy Policy (available at westpac.co.nz/privacy).

Westpac branch use – branch checklist

Branch name

Staff name

- Form is complete Customer is AML compliant, current ID and proof of address has been verified/certified and loaded into Sales Customer (Assist)

Your details

For security reasons, we'll contact you using your registered details on file. You can add or update your details anytime in Westpac One® online banking or by calling **0508 972 254**. Get help at westpac.co.nz/update

Mr Mrs Miss Ms Other (please specify) Date of birth

Name FIRST MIDDLE LAST

IRD number

Westpac KiwiSaver Scheme member number Find it in online banking or on your statement.

Your fund choice

All Westpac KiwiSaver Scheme funds (excluding the Cash Fund) are diversified with a mix of income and growth assets. This means there are funds to suit most investment timeframes and risk appetites. **Generally, most people will not need to invest in more than one fund.**

- If you haven't already, check which fund is right for you with the Westpac KiwiSaver Scheme Fund Chooser in online banking or at westpac.co.nz/fundchooser
- Alternatively, view all funds at westpac.co.nz/funds or in the Product Disclosure Statement at westpac.co.nz

Please choose your new fund below (please tick only one):

- Change both my current balance and my future contributions
- Leave my current balance where it is and only change my future contributions

Please choose your new fund below (please tick only one):

- Cash Fund
- Defensive Conservative Fund
- Conservative Fund
- Moderate Fund
- Default Balanced Fund
- Balanced Fund
- Growth Fund
- Multiple funds – I'd like to invest in more than one fund, as specified below:

Include the fund names and the % allocation to each. Must total 100%. Any remainder will be allocated to the Conservative Fund.

Authorisation for switch

PLEASE PRINT THIS FORM AND SIGN THIS SECTION.

Member signature Date DD / MM / YYYY

Important: A parent or guardian must sign on behalf of a member under the age of 18 years. If this form is being completed on behalf of a member under the age of 18 years, or by a Power of Attorney, that person must sign the below. An Attorney signing on behalf of the member must complete a certificate of non-revocation of Power of Attorney.

I NAME confirm that I am authorised to sign this form on behalf of the member named.

Your signature Date DD / MM / YYYY