

Complete this form to **appoint or change** the adviser associated to your JMI Wealth KiwiSaver Scheme account.

JKS40 – 15.06.2025

Your details

IRD number:

 - -

(You must enter your IRD number)

Name:

Date of birth:

(dd/mm/yyyy)

Phone: ()

Home address:

Town/city:

Post code:

Email:

Employer:

Change, add or remove an adviser

Your current adviser name (If you don't have a current adviser, leave blank):

Adviser Name:

Select one of the following options:

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1. Add an adviser

I wish to appoint the adviser named below and confirm that they can access information provided in relation to my JMI Wealth KiwiSaver Scheme account.

Adviser Name:

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2. Change adviser

I wish to remove and replace the adviser named below and request that they are no longer given access to information provided in relation to my JMI Wealth KiwiSaver Scheme account.

Adviser Name:

I wish to appoint the adviser named below and confirm that they can access information provided in relation to my JMI Wealth KiwiSaver Scheme account.

Adviser Name:

☐

3. Remove an adviser

I wish to remove the adviser named below and request that they are no longer given access to information provided in relation to my JMI Wealth KiwiSaver Scheme account.

Adviser Name:

Appointing an adviser

By signing this form, you agree to appoint the named adviser, as your financial adviser in relation to your JMI Wealth KiwiSaver Scheme account. Your adviser will have rights of access to information relating to your JMI Wealth KiwiSaver Scheme account and will be informed of any actions you take in relation to your JMI Wealth KiwiSaver Scheme account.

You understand that your adviser will be paid a fee by the distributor of the JMI Wealth KiwiSaver Scheme for providing you with advice in relation to your JMI Wealth KiwiSaver Scheme.

Signature

Your signature:

Date:

Note: Unless you advise otherwise, communication material, where appropriate, is provided by the JMI Wealth KiwiSaver Scheme via email to ensure timely delivery of service.