

How to use this form

This form helps you change your investment strategy. Please take time to read the JMI Wealth KiwiSaver Scheme Product Disclosure Statement if you want to know more about the choices available to you.

If you need help with changing your investment strategy then please get in touch with one of our friendly customer service members at 0800 80 87 87.

Send the completed form to us at contact@myjmiwealthkiwisaver.co.nz or post it to us at PO Box 105262, Auckland 1143. You can also make changes by going to your member login site at www.jmiwealth.co.nz/jmi-wealth-kiwisaver-scheme.

Fund switches are generally completed within 5 business days after we have received your completed form. It may take longer if there are any incomplete sections or we need to ask you for additional information.

SECTION 1: Your information

First name(s)

Surname

Date of birth

(dd/mm/yyyy)

IRD number

Prescribed investor rate:

10.5%

17.5%

28%

To work out your prescribed investor rate, go to ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate

SECTION 2: Change your investment strategy

I would like to (please select one option)

Option 1: Invest 100% of my savings in (select one fund below):

Conservative Fund

Balanced Fund

Growth Fund

Continue to Section 4.

Option 2: Choose my own mix of funds (select all applicable choices):

Change my current savings

Change my future contributions

Fund Name	%
Conservative Fund	
Balanced Fund	
Growth Fund	
Total (must add to 100%)	

Fund Name	%
Conservative Fund	
Balanced Fund	
Growth Fund	
Total (must add to 100%)	

If you wish for us to update both your current savings and future contributions, please ensure that you have indicated this by completing both choices above.

Continue to Section 3.

SECTION 3: Rebalancing strategy (complete this section only if you have selected your own mix of funds)

Where you have selected multiple funds, the proportion of funds you hold may become misaligned with your investment strategy over time due to various factors, such as investment performance differences between the funds. Rebalancing allows us to align your proportion of funds back to your intended investment strategy.

If your current savings and future contribution investment strategies are aligned, we will periodically apply standard rebalancing to maintain the proportions set out in your chosen fund(s).

Tick one of the options below if you want another option.

☐

No rebalancing

☐

Regular withdrawal rebalancing

For regular withdrawal rebalancing, we will only rebalance by moving money from higher volatility funds (such as shares and property) to lower volatility funds (such as fixed interest and cash) and not the other way.

If your current savings and future contribution investment strategies differ, rebalancing is not available.

SECTION 4: Your Authorisation

This form collects personal information that we use to verify your identity and address. The information collected is used to provide you with our service. All the information collected is held by JMI Wealth KiwiSaver Scheme's licensed manager, Smartshares Ltd, PO Box 105262, Auckland City 1143. We will take reasonable steps to ensure that your information is protected from unauthorised access, use, modification, or disclosure (or other misuse).

Please read and tick the following box before signing below.

☐

I authorise Smartshares Limited to implement the above strategy changes.

Please note requests, once received by us, cannot be amended or cancelled.

Name

Signature

Date