Changes in personal details

Use this form if you are updating your personal contact details or change your legal name. Return to New Zealand Funds Management Limited, Private Bag 92226, Victoria Street West, Auckland 1142, or by email to clientservices@nzfunds.co.nz.

Account name

NZ Funds client number

Type of client

☐ **Individual / Joint** ☐ **Company** ☐ **Trust** ☐ **Other** (please specify)

Only complete the relevant sections for the details you wish to update.

1. Change of contact details

Old address

Street / PO Box

Suburb | Town / City | Postcode

New address

Street / PO Box

Suburb | Town / City | Postcode

New phone number(s)

Mobile | Home | Business

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.

2. Change of name

Your previous details

Previous name

Title | First name | Middle name(s) | Surname

Date of birth

Day | Month | Year

Previous signature

IRD number

Your new details

New name

Title | First name | Middle name(s) | Surname

New signature

Reason for name change (please tick in the below boxes)

- ☐ Change of name by marriage
- ☐ Change of name by Deed Poll / Statutory Declaration
- ☐ Name incorrectly recorded
- ☐ Dissolution of marriage
- ☐ Other (please specify)

Please attach copies of supporting documents to this form (a copy of your marriage certificate, birth certificate, name change certificate, separation agreement, Deed Poll or Statutory Declaration, passport).

Acknowledgment

I understand that this change of name for my NZ Funds account will be implemented as soon as practicable after we receive this completed form.

Signature

Day | Month | Year

3. Change in bank details

Please provide details for one bank account into which all withdrawal payments will be deposited.

The bank account should be in the same name as your NZ Funds account.

Please attach proof of your bank account details such as a bank statement a bank certificate or a deposit slip.

Bank account name

Bank | Branch

Bank | Branch | Account | Suffix

4. Signature(s)

- I/we understand that this change of details for my NZ Funds account will be implemented as soon as practicable after NZ Funds receives the completed form.
- I/we understand that personal information provided in this form and any personal information provided by me/us in the future may be used by NZ Funds and The New Zealand Guardian Trust Company Limited (Supervisor) including their related entities, and shared with and used by my/our Financial Adviser and by other service providers to the Portfolios, for the purposes of enabling NZ Funds and those service providers to arrange, manage and administer my/our investment, to contact me/us in relation to my/our investment, and to provide me/us with information about other products and services. NZ Funds may also use and share my/our personal information for the purposes of complying with any laws in New Zealand or another country, including using it to verify (whether by electronic means or otherwise) any identity information provided to NZ Funds. NZ Funds may also share my/our personal information with relevant authorities, including the Financial Markets Authority and Inland Revenue.
- I/we acknowledge that I/we have the right to access and correct this information.
- I/we agree to the terms set out above.

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

Individual 1 / Director 1 / Trustee 1

Day Month Year

Individual 2 / Director 2 / Trustee 2

Day Month Year

Director 3 / Trustee 3

Day Month Year

Director 4 / Trustee 4

Day Month Year