

# Fidelity Super-Super Plan, Number 3 Investment Switch Form

**Use this form if you would like to change how your savings are invested in your Plan.**

Before completing this form you should refer to the Fidelity Super-Super Plan, Number 3 product disclosure statement, available from your financial adviser or by visiting [www.booster.co.nz](http://www.booster.co.nz) and clicking on *Superannuation*, for information about the Investment Portfolios, the risks associated with these Investment Portfolios, and the fees that may apply.

We recommend that you talk to your financial adviser before making any changes to your investments. If you have any questions about completing this form, please talk to your financial adviser or call our Client Services Team on (04) 894 4300.

Once completed, email or post the form to your financial adviser, or to the Manager, Booster Investment Management Limited, Freepost 224954, PO Box 11 872, Wellington 6142, email [super@booster.co.nz](mailto:super@booster.co.nz)

## 1. Personal details

Policy/Member number	IRD number	Prescribed Investor Rate (PIR)*
<input type="text"/>	<input type="text"/>	10.5% <input type="checkbox"/> 17.5% <input type="checkbox"/> 28% <input type="checkbox"/>
Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/> Other <input type="checkbox"/>	
Surname	<input type="text"/>	
First name(s)	<input type="text"/>	
Middle name(s)	<input type="text"/>	
Residential address	<input type="text"/>	
		Postcode <input type="text"/>
Mailing address	<input type="text"/>	
If different from the above		Postcode <input type="text"/>
Telephone numbers	Home <input type="text"/>	Work <input type="text"/>
		Mobile <input type="text"/>
Email	<input type="text"/>	

\*To calculate your PIR, please visit [www.ird.govt.nz/toii/pir/workout/](http://www.ird.govt.nz/toii/pir/workout/) or talk to your financial adviser.

## 2. My new investment instruction

Tell us how you would like your balance (money you already have in your Plan) and future contributions (money paid to your Plan in the future) to be invested.

Simply complete the columns below. You may invest in up to 4 Investment Portfolios, **however you cannot switch money invested in a New Zealand dollar denominated Investment Portfolio into the Sterling Cash Portfolio or the Sterling International Share Portfolio (Sterling Portfolios).**

The minimum proportion you can allocate to any one Investment Portfolio is 10%. The percentages must be shown as whole numbers and each column must add up to 100%.

Tick this box if you want to leave your balance where it is. If you tick this box, only complete the Direct my future contributions column below.

Investment Portfolio	Change my balance to:	Direct my future contributions to:
Conservative Portfolio	<input type="text"/> %	<input type="text"/> %
Balanced Portfolio	<input type="text"/> %	<input type="text"/> %
Growth Portfolio	<input type="text"/> %	<input type="text"/> %
Aggressive Portfolio	<input type="text"/> %	<input type="text"/> %
Cash Portfolio	<input type="text"/> %	<input type="text"/> %
NZ/Australian Shares Portfolio	<input type="text"/> %	<input type="text"/> %
International Share Portfolio	<input type="text"/> %	<input type="text"/> %
Options Portfolio	<input type="text"/> %	<input type="text"/> %
Sterling Cash Portfolio*	<input type="text"/> %	<input type="text"/> %
Sterling International Share Portfolio*	<input type="text"/> %	<input type="text"/> %
<b>Total must equal 100%</b>	<input type="text"/> %	<input type="text"/> %

### Please note:

#### Minimum rates of return:

Prior to 1 July 2009, a minimum rate of return applied on net regular contributions if the Plan is held to maturity. The minimum rate of return depended on the mix of the Investment Portfolios you had chosen and was either 2%, 1% or 0% per annum. If eligible for the minimum rate of return, by changing your investment mix, new minimum rates of return may apply.

#### \*Sterling Portfolios:

The minimum amount that you can switch from the Sterling Portfolios at any one time is the greater of 25% of your investment in the Sterling Portfolios or 10,000 pounds Sterling. Money switched from the Sterling Portfolios to a New Zealand dollar denominated Investment Portfolio cannot be subsequently re-invested in the Sterling Portfolios.

### 3. Member's acknowledgement

- i. I confirm that the above information is correct and I authorise the Manager to switch my current balance and/or redirect my future contributions as well as update my other details in accordance with my instructions on this form; and
- ii. I confirm that I have read and understood the current product disclosure statement prior to completing this form; and
- iii. I understand that any contributions I make will be invested in accordance with my existing investment instructions until such time as these new investment instructions are accepted and processed by the Manager; and
- iv. I acknowledge that if eligible for the minimum rate of return, by changing my investment mix, new minimum rates of return may apply; and
- v. I understand that I will receive confirmation of my investment switch by email or post once my request has been processed by the Manager and that I should not assume that my request has been processed until such time as I receive confirmation; and
- vi. I understand that once actioned these investment instructions will apply until I advise the Manager otherwise; and
- vii. I understand that making an investment election is my responsibility and my choice may affect the fees I pay and the investment risks I am exposed to; and
- viii. I understand that tax will be calculated and debited (where appropriate) at my recorded PIR and that it is my responsibility to notify the Manager of my correct PIR; and
- ix. In the event that the PIR is incorrect, I agree to indemnify the Manager against any liability that may arise, as a result of any amount of unpaid tax and consequent penalties incurred, or as a result of any amount of tax overpaid, and I understand that I will not be able to receive a refund if I overpay PIE tax as a result of supplying an incorrect PIR; and
- x. I understand that none of the Manager, the Supervisor (Public Trust), or any director, board member or nominee of any of those entities, or any other person guarantees the Plan's performance, returns or repayment of capital.

**Member's signature:**

**Date**

<i>Day</i>	<i>Month</i>	<i>Year</i>			