



Craigs KiwiSaver Scheme

Investment Direction and Switch Form

WHERE TO SEND YOUR COMPLETED FORM

Please either deliver your completed form to the nearest Craigs Investment Partners branch, or post it to:

Craigs KiwiSaver Scheme
Craigs Investment Partners Limited,
Freepost 366, PO Box 13155,
Tauranga 3141.

Phone: 0800 878 278
Email: clientservices@craigsip.com

You are in control of your investments and as such this form provides you the ability to:

- change your investment direction going forward; and/or
- to sell down your current holdings and reinvest into different securities/funds.

Form Checklist

Please ensure you complete section A 'Your Details' before completing the relevant sections. Indicate below what sections you have completed.

- Section B. Investment Direction
- Section C. Sale and Reinvestment Request (Switch Request)



Your Details

Scheme Account Number

Title *please select one*

 Mr Mrs Miss Ms Dr Other _____

Full Name *first, middle and last name*

Mailing Address

 Post code **Contact Phone** _____ **Email** _____

CLIENT ACCOUNT NO.

INVESTMENT ADVISER

craigsip.com



B Investment Direction

B1 PLEASE SUSPEND CURRENT CONTRIBUTIONS AS DETAILED BELOW:

Suspend all contributions to my existing Investment Direction

OR

Suspend contributions to the following securities/funds:

Security/Fund Name	Code	Market

Please complete section B2 below.

You must complete this section if you have suspended your current Investment Direction in Section B1.

B2 PLEASE INVEST ALL FUTURE CONTRIBUTIONS AS BELOW:

Please indicate a value for direct contributions or a percentage for contributions received direct from Inland Revenue.

Security/Fund Name	Code	Value	or	Percentage
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
Total		\$		%

C

Sale and Reinvestment Request (Switch Request)

C1

SALE OF SECURITIES/FUNDS

Sell all holdings

OR

Please sell the following Securities/Funds:

Security/Fund Name	Code	Value	or	Units
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		Total	\$	

Please complete section C2 below.

C2

PURCHASE OF SECURITIES/FUNDS

Reinvest sale proceeds

Security/Fund Name	Code	Value	or	Percentage
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		\$	or	%
		Total	\$	%

You must complete this section if you have requested a sale of securities under section C1.

D

Reason for change in investment direction and/or switch

- Portfolio diversification
- Under-performance of a security
- Private Wealth Research recommendation
- Rebalancing Portfolio *please provide details below*
- Currency exposure
- Country exposure
- Industry exposure
- Volatility management
- Change in personal circumstances *please provide details below*
- Other *please provide details below*

E

Signature of Authorised Person(s):

- I acknowledge that I have read and understood the latest Craigs KiwiSaver Scheme Product Disclosure Statement

Full Name *first, middle and last name*

Capacity

Signature

Date | D | D | M | M | Y | Y | Y | Y |

Full Name *first, middle and last name*

Capacity

Signature

Date | D | D | M | M | Y | Y | Y | Y |

Capacity

Please enter the 'Capacity' in which you are signing this Application Form i.e. Self; Attorney for the Client; Parent or Guardian for a Minor.