

# APPLICATION FORM

Questions? Call 0800 427 384

## PERSONAL DETAILS

 

Title Surname

Given names

 

Date of birth Male or female

Street address

Suburb

 

City Postcode

 

Daytime phone number Mobile phone number

Email one

Email two

I would like to consent to receiving the Annual Member Statement by email.

  

IRD number This must be your personal IRD number

## YOUR PRESCRIBED INVESTOR RATE

12.5%  21%  30%

For more information on prescribed investor rates, please refer to the "What Returns Will I Get" section of the Investment Statement.

## INVESTMENT MANDATE

Your investment mandate determines which investment portfolio/s you invest in. You can invest in one of our three defined portfolios (conservative, balanced, growth) or spread your investment across them.

I direct the trustee to invest my contributions as follows:

Conservative portfolio

Balanced portfolio

Growth portfolio

100%

Please enter how you would like your investment allocated across these portfolios. Your allocation must 100% and be in 5% increments.

If you do not choose an investment mandate, you will be given a 100% balanced portfolio.

## EMPLOYER DETAILS

Only applicable if your employer is to deduct contributions from your salary.

Name of your employer

Employee number

Street address

Suburb

 

City Postcode

I authorise my employer to make deductions from my gross wage/salary at the following rate:  %

Date contributions are to commence:  /  /

## CONTRIBUTIONS OTHER THAN FROM SALARY OR WAGES

To join the Scheme as an individual who is not an employee of a participating Employer, you must make an initial contribution of at least \$500 by direct debit, cheque, or by way of a transfer from another superannuation scheme.

You may thereafter contribute in two ways:

1. To make regular contributions, please complete and enclose the direct debit form when sending the application. Direct debit payments may be weekly, fortnightly, monthly, bi-monthly, quarterly, or six-monthly and must be a minimum of \$500.
2. You may also make lump sum payments at any time by sending a cheque made out to GMI Superannuation Scheme Trust. Lump sum payments must be a minimum of \$500.

For more information please refer to the "How Much do I Pay" section of the investment statement.

## TRANSFER FROM ANOTHER SCHEME

I apply to transfer my interest/benefits in my current superannuation scheme to the GMI Superannuation Scheme.

Current scheme name

Scheme administrator address

Please tick this box if you would like to transfer your benefits from a United Kingdom registered pension scheme to the GMI Superannuation Scheme.

## IDENTITY VERIFICATION

You do **NOT** have to provide any identification if:

- your initial payment is made with a personal cheque or
- your regular payment is direct debited from your personal bank account

Otherwise, please provide a photocopy of **ONE** item from **EACH** list:

### LIST A

- current passport
- New Zealand drivers licence
- photo credit card
- birth certificate
- firearms licence

### LIST B

- recent bank statement
- power, phone or rates bill
- HANZ 18+ card
- community services card

We advise you to provide us with witnessed ID certified by either a Justice of the Peace, Court Registrar, Solicitor or Gareth Morgan Investments staff member at the time of joining. If your ID has not been witnessed, you may be asked to provide witnessed ID before withdrawing your investment.

## MEMBER DECLARATION AND AUTHORISATION

- I declare that I am eligible to enrol in the GMI Superannuation Scheme, and that all the information contained in this form is true and correct.
- I have received, read and understand the GMI Superannuation Scheme Investment Statement and, where applicable, the supplement accompanying the Investment Statement that relates to my employer's workplace plan.
- I acknowledge that the Privacy Act 1993 gives me the right to access and correct personal information held by Gareth Morgan Investments Limited Partnership (including associated entities and agents) and the Trustee. I agree that the information in this application form, and any information provided by me at any later date, may be used to administer the GMI Superannuation Scheme.
- I understand that the capital value of my contributions/investment in the GMI Superannuation Scheme can rise or fall depending on market conditions or the investment manager's investment decisions. It is therefore possible that I may receive less back than I have invested. I acknowledge that choosing my investment mandate is solely my responsibility and neither the GMI Superannuation Scheme's Sponsor, Manager nor the Trustee is to be regarded as representing or implying that my investment mandate is appropriate for my personal circumstances. My choice of Investment mandate is a binding direction from me to the Trustee.
- If I have provided my email address, or if I provide it at any later date, I consent to receiving electronic communications (including email or via the secure log-in on [www.gmisuper.co.nz](http://www.gmisuper.co.nz) website) in respect of the GMI Superannuation Scheme and additional services. You may elect to not receive electronic communications at any time.

## CHECKLIST

Please ensure that you have:

- filled in the required fields
- attached any ID required
- signed and dated this form
- enclosed a cheque or direct debit form for your initial contribution (if applicable)

## SIGNATURE OF APPLICANT:

Date:

/ /

### Mail to:

FreePost 210729  
Gareth Morgan Investments Limited Partnership  
PO Box 10068  
Wellington 6143

Office use:

EMPREF:

MKTSRC: