



Westpac Managed Fund Change of Personal Details Form

To be used to amend the details for an existing investor in a Trust within Westpac Active Series or the Corporate Bond Fund (each a 'managed fund').

*These fields must be completed.

Unit holder number

A. Your Personal Details

Mr Mrs Miss Ms Other (please specify) _____

Name* FIRST MIDDLE LAST

Account name (if different from above)

Email*

Name of Entity NAME OF COMPANY, INCORPORATED BODY, PARTNERSHIP OR TRUST

IRD number

B. Change Contact Details

Physical Address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Postal Address (if different) NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Phone HOME MOBILE

Westpac may be required to verify your new address. Please refer to Westpac's list of acceptable verification documentation available at westpac.co.nz/AML.

C. Change Prescribed Investor Rate (PIR)

Prescribed Investor Rate (PIR) 0% 10.5% 17.5% 28%

Joint investors will be treated as a single unit holder with a PIR equal to the highest PIR of the joint investors. If you are a non-New Zealand tax resident, please elect the 28% PIR above.

D. Changing signing instruction for all requests

All to sign Any investor to sign Any of _____ investors to sign (insert number)

All authorised parties need to sign in section E.

(except company investments)

E. Authorisation*

I acknowledge that this instruction will not become effective until verified by the Manager

Unit holder signing instructions:

All unit holders of the investment in the relevant managed fund are required to sign this request. If the request is from:

- a person under 18 – the request must be signed by the parent or guardian with signing authority
- a company or incorporated body – the request must be signed by the authorised signatories (and by signing also confirm that they are authorised to make this request)
- power of attorney – an attorney appointed under a Power of Attorney must provide a certified copy of the Power of Attorney and complete a certificate of non-revocation and forward it with this request
- the trustees of a trust – the request must be signed by the authorised signatories (and by signing also confirm that they are authorised to make this request)
- a partnership – the request must be signed by the authorised signatories (and by signing also confirm that they are authorised to make this request)

Signature _____

Date DD / MM / YYYY

Signature _____

Date DD / MM / YYYY

Signature _____

Date DD / MM / YYYY

Please return the completed form to:



Westpac Managed Funds
PO Box 934
Auckland 1140



Westpac Managed Funds
Westpac on Takutai Square
53 Galway Street
Auckland 1010



Any Westpac branch

You can also contact us on **0800 808 012** between 8:30am and 5pm (NZ time), Monday to Friday.