



Please email this form and any supporting documentation to:
 masinvest@linkmarketservices.com

Or

Please send completed form and supporting documents by post to:

MAS FREEPOST 884,
 PO Box 91976
 Victoria Street West, Auckland 1142

For assistance:

Phone 0800 627 738

Important information

This form can be used to switch funds and/or change your future investment strategy in your Investment Funds account.

Individual and joint investors can also complete a switch online in the MAS Investor Portal at masinvest.co.nz

Requests to switch your Fund(s) received by 5pm on any given valuation day (which is typically every business day in Auckland and Wellington) will be processed using the unit price for that day.

Requests to change how your future contributions are allocated received by 5pm on any given valuation day (which is typically every business day in Auckland and Wellington) will be processed on the same day.

If your switch request is received after 5pm or on a non-business day, we will process the request on the next valuation day.

Generally, we aim to process a switch request within 3 business days of accepting the switch.

Understanding your attitude to investment risk is important to help you understand how to invest your savings. You can use our Fund Finder to learn what kind of investment approach could be right for you and what kind of investment fund could be suited to your personal situation and investment objective. See our Fund Finder at mas.co.nz/fundfinder

We recommend that you talk to your MAS Adviser before making any changes to your investments. You can talk to your MAS Adviser by calling us on **0800 800 627** or by email info@mas.co.nz

1. Investor details

Account Number

MAS Member Number

Investor(s) full name / name of entity

Email

Phone number

2. Change your investment

In this section you can change how your current investment balance is allocated across the Fund(s) and/or change how your future investments are allocated – this is called your future investment strategy. You can find out more about how your future investment strategy works in the Product Disclosure Statement at mas.co.nz/investmentfunds

Switch current balance

Select the Fund(s) below.

Fund	% (must add to 100%)
Global Equities	%
Aggressive	%
Growth	%
Balanced	%
Moderate	%
Conservative	%
Cash	%

Change how future investments are allocated

Select the Fund(s) below.

Fund	% (must add to 100%)
Global Equities	%
Aggressive	%
Growth	%
Balanced	%
Moderate	%
Conservative	%
Cash	%

Important

For lump sum or regular payments through online banking you can choose which Fund(s) to invest into when you make the payment. If you do not provide a Fund(s) choice, your investment will be allocated based on your future investment strategy.

If you have a regular investment plan (via a direct debit) your investments will be allocated based on your future investment strategy.

You can find out more about how to make additional investments to your account at mas.co.nz/investmentfunds-contributions

3. Declaration

I/we acknowledge that by confirming my/our investment switch that:

- I/we authorise Medical Funds Management Limited as the manager of the Scheme to process my switch request in accordance with my instruction.
- I/we acknowledge that taxes and expenses may be deducted from my account as a result of my investment switch.
- Investment switch requests received and accepted by 5pm on any given valuation day (which is every business day in Auckland and Wellington) will generally take effect on the same day. We will process your switch using the Funds' unit price for that day. If your switch request is received after 5pm or on a non-business day, we will use the unit price for the next valuation day.
- I/we understand that any investment switch request will be processed as soon as practicable.

Authorised signature(s)

Full name	Signature	Date	<input type="text" value="dd-mm-yyyy"/>
Full name	Signature	Date	<input type="text" value="dd-mm-yyyy"/>
Full name	Signature	Date	<input type="text" value="dd-mm-yyyy"/>
Full name	Signature	Date	<input type="text" value="dd-mm-yyyy"/>

Child accounts

For members aged under 18, we require the signature of one parent or guardian below.

<input type="text" value="First name(s)"/>	<input type="text" value="Surname"/>
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- I am the parent/guardian of the investor named above; and
- I have read and agree to the above acknowledgements on behalf of the investor.

Signature of parent/guardian