



# Switch/Reallocation Form

## AMP Savings and Investments Portfolio

### A: Please confirm your personal details

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Client name ..... Client number .....

Are you looking to switch into a Managed Fund (i.e. Unit Trust, Personal Retirement Plan, or Insurance Bond) in which you have not previously invested?

If you have answered yes, you need to complete a new application form from the current Savings and Investments Portfolio Investment Statement. This is a legal requirement.

### B: Declaration

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I have received, read and understood the current AMP Savings and Investments Portfolio Investment Statement

dated .....

Note: Any applications received with no date, the date of an outdated AMP Savings and Investments Portfolio Investment Statement, or incomplete information, are unable to be processed.

Signature (s) .....

Date .....

Note: If your portfolio is jointly owned, both clients must sign above.

### C: Switch Details

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Complete this section if you wish to switch funds from one investment fund to another.

FROM INVESTMENT FUND	FROM UT/PRP/IB	TO INVESTMENT FUND	TO UT/PRP/IB	% OF BALANCE TO SWITCH	\$ AMOUNT TO SWITCH

UT = AMP Unit Trust PRP = AMP Personal Retirement Plan IB = AMP Insurance Bond

#### Switches out of the AMP Unit Trust/AMP Passive Unit Trusts (“the AMP Unit Trusts”)

If you are switching from the AMP Unit Trusts, please select the withdrawal method you prefer. If you do not show your preference, the Manager will use the Manager Buyback method.

Manager Buyback  Direct Redemption

#### Switches out of the AMP Personal Retirement Plan/AMP Passive Personal Retirement Plans (“the AMP Personal Retirement Plans”)

For the AMP Personal Retirement Plans, you can make one switch out (or one withdrawal) per calendar year of up to 20% of your balance at that time. This applies until you reach age 55 or, if you have signed a Lock-In Agreement, until the Lock-In expires. If you are requesting to withdraw more than 20% of your Plan to or from a Passive Personal Retirement Plan, this request will be treated as a request to the Trustee to transfer to another registered superannuation scheme. Acceptance of the request is at the discretion of the Trustee.

#### Switches out of the AMP Insurance Bond

If your switches will clear all of your funds out of the Insurance Bond, please attach your Policy Document.

## D Fund Withdrawal Tax (Only answer this section if you are switching out of the PRP)

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1. Has any employer made contributions into your PRP fund since 1 April 2000 i.e. Other than your own salary deductions?  
Yes  No

*If you have answered "yes" you will need to complete a Fund Withdrawal Tax Questionnaire. The questionnaire determines whether you are liable to pay Fund Withdrawal Tax on employer contributions switched out of the PRP.*

## E: Where do you want your future contributions to go?

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Complete this section if you wish to change where your future contributions are invested. Please list all current and future investment funds, regardless of whether or not a change is being made to that particular fund.

UT/PRP	INVESTMENT FUND	CURRENT AMOUNT	NEW AMOUNT
	<b>TOTAL PAYMENT AMOUNT</b>	<b>\$</b>	<b>\$</b>

UT = AMP Unit Trust

PRP = AMP Personal Retirement Plan

## F: Any questions?

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If you need help completing this form, or if you are unsure of your balance, please contact your Adviser or call us on 0800 808 267. Please send your completed form to: AMP Savings & Investments Portfolio, Freepost 170, PO Box 1290, Wellington.