

Application to make lump sum contributions in the Mercer Super Trust form

Please print in black or blue pen, in uppercase, one character per box.



Start here

Step 1 - Complete your personal details

Membership number

IRD number

Title Mr Mrs Ms Miss

Date of birth / /

Given names

Surname

Street address

Telephone

E-mail

Employer Plan name

Name of your Employer



Step 2 - Choose your investment options

Before selecting investment options, please find out what options are available to your Plan. The asterisked options (*) below can only be selected if available to your Plan. Please refer to Part 2 of the Investment Statement (Your Plan Details) or ring the Helpline on 0508 637 237 for more information.

I wish to make a lump sum contribution to the Plan.

I understand that lump sum contributions must be a minimum of \$1,000*.

I attach my cheque for \$, , .

I wish to invest my lump sum contribution in the following Mercer Super Trust Investment option/s:

Mercer-managed investment options Percentage to be invested

Mercer Conservative	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Cash	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Fixed Interest*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Global Shares*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Growth	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer High Growth*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Active Balanced*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Moderate*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Real Assets*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Shares	<input type="text"/> <input type="text"/> <input type="text"/>	%
Mercer Trans-Tasman Shares*	<input type="text"/> <input type="text"/> <input type="text"/>	%

Externally managed investment options

AMP Capital Investors Balanced Fund*	<input type="text"/> <input type="text"/> <input type="text"/>	%
AMP Capital Responsible Investment Leaders Balanced*	<input type="text"/> <input type="text"/> <input type="text"/>	%
ING Balanced Fund*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Tower ILS Balanced Fund*	<input type="text"/> <input type="text"/> <input type="text"/>	%
Total (must equal 100%)	<input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0	%

Please note that Step 4 must be completed for lump sum contributions in excess of \$10,000.

Step 3 - Sign the form

Member Signature

Date

/ /



Membership number

Step 4 - For lump sums exceeding \$10,000

Has the cash lump sum payment been made on behalf of or at the instruction of any other person or persons?

NO YES if YES, please provide the following details for that person:

Full Name

Address

Provide a form of identification for such other person eg drivers licence, passport:

Type of identification provided

Signature

X

Date

Step 5 - Employer to complete

Was member's identity verified at the date of joining the Plan in compliance with the Financial Transactions Reporting Act?

NO YES

Type of identification provided

Signature

X

Date

Please return your completed form to:

Mercer Super Trust

PO Box 1849

Wellington 6140

