



Withdrawal Form



Use this form if you are withdrawing from NZ Funds Wealth Builder.
Return to New Zealand Funds Management Limited, Private Bag 92226, Victoria Street West,
Auckland 1142, or by email to withdrawals@nzfunds.co.nz.

1. Client details

Account name

NZ Funds client number

2. Withdrawal instructions (Please select one only)

☐ Life Cycle

Withdrawal as per glidepath, based on your age at your last reallocation date. (Not applicable to Trusts.)

☐ Self Select

Please fill out the withdrawal table below.

Portfolio	Notice period*	Withdrawal (\$ or select 'All')	All
Wealth Builder – Self Select			
Income Strategy	None	\$	☐
Inflation Strategy	None	\$	☐
Growth Strategy	None	\$	☐

Lump sum withdrawal total

\$

If you make a full withdrawal,
the account will become inactive.

3. Payment details

Please provide details for one bank account into which all withdrawal payments will be deposited.

The bank account should be in the same name as your NZ Funds account. Please attach proof of your bank account details such as a bank statement a bank certificate or a deposit slip. Please direct credit the proceeds of my/our withdrawal to:

Bank account name

Bank

Branch

Bank

Branch

Account

Suffix

4. Client signature(s)

I/we agree to the terms set out in the previous sections.
Where there is more than one Individual, all Individuals must sign below.

Client signature(s)

Individual 1/Director 1/Trustee 1

Day

Month

Year

Individual 2/Director 2/Trustee 2

Day

Month

Year

Director 3/Trustee 3

Day

Month

Year

Director 4/Trustee 4

Day

Month

Year

* This form cannot be processed unless fully completed and signed.

Adviser use only

Adviser declaration

I confirm I am a Financial Adviser authorised to provide financial advice services in relation to this transaction.

Financial Adviser name

Adviser FSP number

Financial Adviser company

Adviser code

Financial Adviser signature

Day

Month

Year

Note
The Anti-Money Laundering and Countering Financing of Terrorism Act 2009 requires verification of identity. In certain circumstances you may be required to complete AML Forms. Please ensure all the relevant AML forms are completed in full, if applicable.