

# INVESTMENT FUND SWITCH FORM



Please complete and return to  
 Whai Rawa, PO Box 13046, Christchurch 8141  
 OR scan and email to: whairawa@ngaitahu.iwi.nz

**FOR ASSISTANCE WITH COMPLETING THIS FORM, PLEASE GO TO:**

- W** whairawa.com
- P** 0800 942 472

**WHAI RAWA NOW OFFERS THREE SOCIALLY RESPONSIBLE FUND CHOICES. IF YOU ARE UNSURE ABOUT WHICH FUND TO CHOOSE, YOU CAN TAKE OUR RISK QUIZ ONLINE HERE: [www.whairawa.com/riskquiz](http://www.whairawa.com/riskquiz)**

The risk quiz may help you to better understand how your approach to risk translates to the investment options available to you. Answer 5 quick questions to find out which investment option might be right for you.

## 1. DETAILS OF ACCOUNT OWNER (ADULT OR TAMARIKI MEMBER)

TITLE	FIRST NAMES*	LAST NAME*
PHYSICAL ADDRESS*		
COUNTRY (CURRENTLY LIVING IN)		POST CODE
EMAIL (LEAVE BLANK IF NO EMAIL)*		
HOME PHONE	WORK PHONE	MOBILE*
DATE OF BIRTH*	YOUR SIX DIGIT WHAKAPAPA NUMBER*	
	*fields are mandatory	

## 2. DETAILS OF ACCOUNT HOLDER (PARENT, GUARDIAN, REPRESENTATIVE; ONLY TO BE COMPLETED WHERE ACCOUNT OWNER IS UNDER 16)

TITLE	FIRST NAMES*	LAST NAME*
PHYSICAL ADDRESS		
COUNTRY (CURRENTLY LIVING IN)		POST CODE
EMAIL (LEAVE BLANK IF NO EMAIL)		
HOME PHONE	WORK PHONE	MOBILE
DATE OF BIRTH*	YOUR SIX DIGIT WHAKAPAPA NUMBER (IF APPLICABLE)	
	*fields are mandatory	

## 3. CHANGE YOUR INVESTMENT OPTION

You can choose from one of the three current fund options (tick one below):

<input type="checkbox"/> <b>TŌTARA</b> Conservative Fund	<input type="checkbox"/> <b>MATAI</b> Balanced Fund	<input type="checkbox"/> <b>RĀTĀ</b> Growth Fund
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- !** By selecting one of the Funds above you are authorising us to switch your Whai Rawa investment – both your current investment and future contributions. Your switch may take up to 7 working days to process, not including mail time. You will receive a confirmation email if we have your current email address on file once the switch is confirmed. If we do not have an email for you, you will receive a confirmation letter by post.
- > For a faster switch head to [www.whairawa.com/login](http://www.whairawa.com/login) to access your account at any time.

SIGNED	DATE
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Whai Rawa Unit Trust is issued by Whai Rawa Fund Limited. A copy of the Product Disclosure Statement is available at [www.whairawa.com/pds](http://www.whairawa.com/pds).

We take no responsibility as to whether or not you complete our Risk Quiz before selecting a fund, and take no responsibility for checking that the fund you select matches the outcome of your Risk Quiz or that you have completed it correctly. The Risk Quiz does not provide investment recommendations or financial advice personalised to you.

By signing this form you confirm that you have viewed a copy of the Product Disclosure Statement for Whai Rawa and you have had an opportunity to read and understand the information contained in the Product Disclosure Statement.