

# Investment Rebalance Form

Please complete this form in order to rebalance your existing portfolio. Please refer to the current Passively Managed Fund Options Product Disclosure Statement (**PDS**) before completing this form.

## Member Details

Full Name

Garrison Bridge Member Number

## Rebalance Of Portfolio

The current investment allocation of the portfolio will be changed to the new allocation below.  
You do not need to include the amount to be switched, only the percentage of the total holding to be held in each Fund.

|                       |      |
|-----------------------|------|
| NZD Cash Fund         | %    |
| NZD Conservative Fund | %    |
| NZD Growth Fund       | %    |
| GBP Conservative Fund | %    |
| GBP Balanced Fund     | %    |
| GBP Growth Fund       | %    |
| AUD Balanced Fund     | %    |
| Total                 | 100% |

## Member Signature

I understand Lifetime Asset Management (**Lifetime**) will process rebalance transactions as they are received, rebalances are normally processed in 3-9 business days, but may take longer during non-trading periods. A rebalance across different currencies will use the prevailing exchange rate at the time of the rebalance, which may be different than at the time we received your Investment rebalance; and

- I confirm that I have read and understood the relevant Product Disclosure Statement/s for the fund/s I have chosen prior to completing this form; and
  - I understand that making an investment election is my responsibility, and my choice may affect the fees I pay and the investment risks I am exposed to; and
  - I understand that, once actioned, these investment instructions will apply until I advise Lifetime otherwise; and
- I understand that if I have rebalanced from GBP or AUD Funds to NZD Funds and had previously elected a 0% Prescribed Investor Rate (**PIR**) as a transitional resident, I have updated my Tax Information including electing a new PIR rate below.

Member Signature

Date (DD/MM/YYYY)

## Tax Information

If you are a non New Zealand resident investor, your PIR is 28%.

IRD Number:

PIR:

10.5%

17.5%

28%

If you are unsure how to calculate your PIR rate, please refer to the [Inland Review](#) for guidance.

## Sending Your Application

Please email, post or courier to our service centre:

**Email:** super@garrisonbridge.co.nz

**Post:** PO Box 10760, Wellington 6140, New Zealand

**Courier:** Level 5, 139 The Terrace,  
Wellington 6011, New Zealand

## Contact Details

**Website:** www.garrisonbridge.co.nz

**Email:** super@garrisonbridge.co.nz

**Phone:** 0800 254 338