Financial Adviser Fee – Smart KiwiSaver Scheme

Complete this form if you are already a Smart KiwiSaver Scheme member, have a financial adviser and have agreed with the adviser that he/she will be paid a fee for providing you with financial advice.

SECTION 1: Personal Details (Member)

Name

Date of Birth (dd/mm/yyyy)

SECTION 2: Financial Adviser Fee

Financial Adviser Fee

% per annum of your account balance or $ per annum (complete the fee amount you have agreed with your adviser). The maximum financial adviser fee you can agree with your financial adviser is: (a) 0.50% per annum of your account balance; or (b) $500 per annum.

SECTION 3: Financial Adviser Details

Name

Company Name

Phone

Mobile

Email

I instruct you to charge me the financial adviser fee and pay it to my financial adviser. I authorise you to disclose information about me and my investments to my financial adviser (and his/her company). I understand that the financial adviser fee will be deducted from my account balance.

I will tell you if I want you to stop charging the financial adviser fee (for example, if I no longer use my financial adviser).

Member Signature

Date (dd/mm/yyyy)

The financial adviser must be party to a Financial Adviser Fee Agreement with us.