

Please forward completed documents to:
masinvest@linkmarketservices.com

Or post to:
MAS Superannuation
FreePost 884
PO Box 91976
Victoria Street West, Auckland 1142

For assistance:
Phone 0800 627 738
Email masinvest@linkmarketservices.com

i Important information

The MAS Retirement Savings Scheme is registered under the Financial Markets Conduct Act 2013.

Name: MAS Retirement Savings Scheme, SCH10706
ROPS number: ROPS 500084

For more information about transferring funds from an overseas superannuation scheme, please read the MAS Retirement Savings Scheme Product Disclosure Statement available on our website at mas.co.nz/retirement-savings

1. Your information

Full name

Member number Date of birth

Postal Address

Phone number

Email

Prescribed investor rate (PIR) 10.5% 17.5% 28%

Please refer to ird.govt.nz/pir for more information on how to determine your PIR.

2. Details of the superannuation scheme you wish to transfer from

Is it a UK pension scheme? If so, MAS cannot accept transfers from unfunded public pension schemes such as the National Health Service, under UK law.

Please provide a copy of the statement or other correspondence from the company you have your superannuation with, so we can get information such as your account or reference numbers.

Name of company

Company address

What name is the investment in?

Account/reference number

3. Authority to act on your behalf

I the undersigned wish to arrange for my superannuation scheme with you to be transferred as soon as possible to the MAS Retirement Savings Scheme, a registered superannuation scheme.

I hereby authorise the Manager, Medical Funds Management Limited, and its agents, including Medical Assurance Society New Zealand Limited and Link Market Services Limited to act as my agent for the purposes of actioning this transfer. Please provide them with all the information they require to carry out this instruction.

Privacy Statement

We collect, store, use, and disclose your personal information in accordance with our Privacy Statement which is available on our website at mas.co.nz/privacy-statement. You can contact us in relation to your privacy by emailing privacyofficer@mas.co.nz or calling us on 0800 800 627.

Signature of Member

Date