

Process Flow

Term Advantage Fund

Application - cheques

1. Client reads the latest “Term Advantage Fund Investment Statement” and fills out the Term Advantage Fund Application Form.
2. Note that for your clients, the minimum investment has been reduced to \$5,000.
3. **CLIENT MAKES CHEQUE PAYABLE TO: AMP Custodian Services (NZ) Limited – PIP Application Account.**
4. Please check that the cheque has been made out to the account shown above.
5. Term Advantage Fund Application Form and cheque is posted to: Applications, PO Box 106-435, Auckland 1143.
6. Cheque is banked and once funds are cleared, units are purchased in the Term Advantage Fund.
7. Once units are issued to client, an Acknowledgement Letter is sent to client and a copy is forwarded to their adviser by email.

Application - direct credit

1. Client reads the latest “Term Advantage Fund Investment Statement” and fills out the Term Advantage Fund Application Form. Please make sure the dollar amount is exactly the same as the amount being direct credited.
2. Note on the Application Form that monies will be direct credited.
3. Direct credit from client’s bank account to: **AMP Custodian Services (NZ) Limited – PIP Application Account 02-0500-0936956-000.**
4. The critical item for the direct credit is that the “code” used in the code field is a six character alphanumeric code made up of first three letters of client’s surname and any combination of numbers – e.g. EDM001.
5. Scan Application Form and send to query@ampcapital.co.nz or fax to 09 360 4501.
6. Place Application Form in post to: Applications, PO Box 106-435, Auckland 1143. Once funds are cleared, units are purchased.
7. Once units are issued to the client, an Acknowledgement Letter is sent to the client and a copy is forwarded to their adviser by email.

Early withdrawal of funds

1. Complete “Early Withdrawal of Funds” (available from AMP Capital Investors).
2. Scan the completed “Early Withdrawal of Funds Form” and email to: info@appelloservices.co.nz; or fax to: 09 360 4501; or post to: Applications, AMP Capital Investment Funds, PO Box 106-435, Auckland 1143.

Change of details forms

1. Complete “Change of Details Form” (available from AMP Capital Investors).
2. Scan the completed Change of Details Form and email to: query@ampcapital.co.nz; or fax to: 09 360 4501; or post to: Applications, PO Box 106-435, Auckland 1143.

General

For advisers wishing to know more about the AMP Capital Investment Funds please contact:

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