

Process Flow

AMP Capital Investment Funds and Cash Advantage Fund

Application - cheques

1. Client reads the latest “AMP Capital Investment Funds or Cash Advantage Fund Investment Statement” and fills out the AMP Capital Investment Funds or Cash Advantage Fund Application Form.
2. Note that for your clients, the minimum investment has been reduced to \$1,000.
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. Both the AMP Capital Investment Funds and Cash 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 selected AMP Capital Investments Funds or Cash 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 “AMP Capital Investment Funds or Cash Advantage Fund Investment Statement” and fills out the AMP Capital Investment Funds or Cash 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.

Withdrawing funds

1. Complete “Withdrawing Funds Form” (available from AMP Capital Investors).
2. Scan the completed Withdrawing 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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or visit www.ampcapital.co.nz