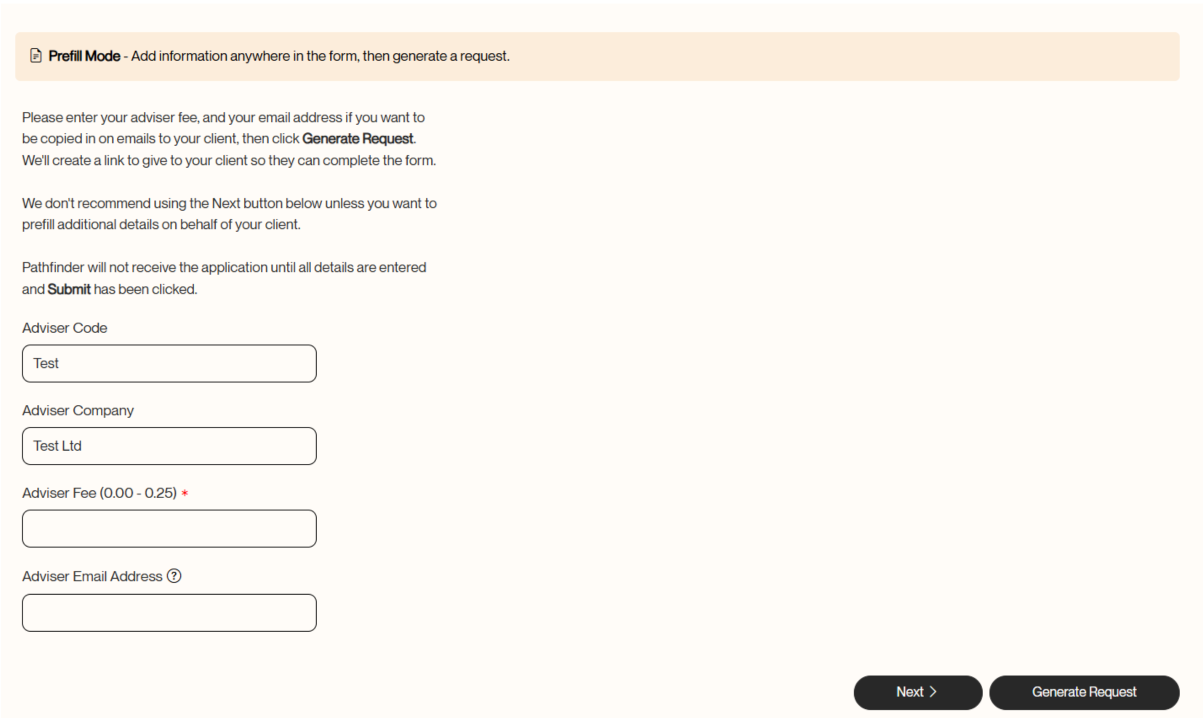
Pathfinder KiwiSaver Adviser Application Form Guide

Step 1:

Once you have clicked the link we provide you, you will be faced with the "adviser only" page. This page is for you to:

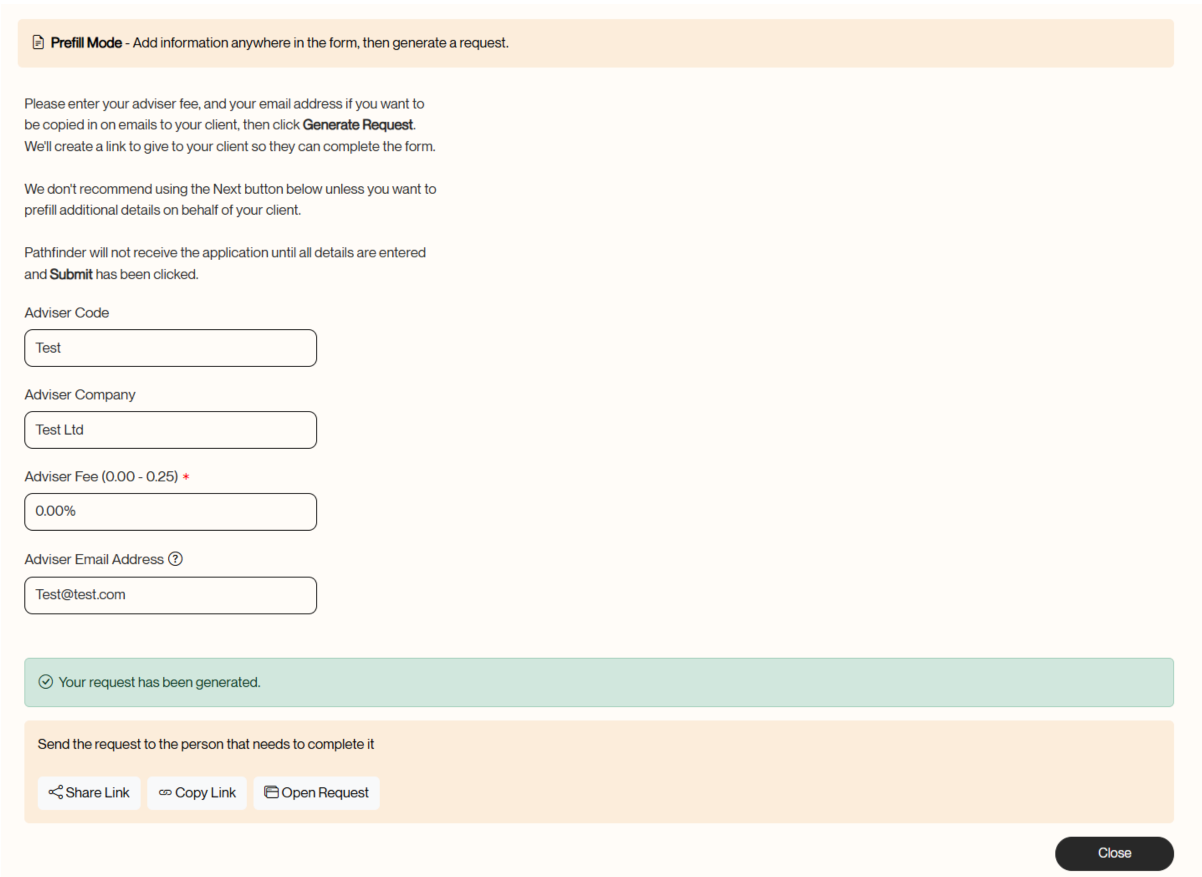
1. Elect an advice fee (charged to your client, separate from the commission and upfront)
2. Enter ***your own*** email address to be kept in the loop with any communications going to the client (you'll drop off after successful onboarding).



Step 2:

When you’re ready, click ‘generate request’. From there you’ll be given three options:

1. Share Link – using the preloaded applications on your device, you can share the application form with your client.
2. Copy Link – you can copy and paste the link to use it in your own material.
3. Open Request – this option takes you directly to the client application form, should you want to either prefill information for your client, or complete the application form.


Prefill Mode - Add information anywhere in the form, then generate a request.

Please enter your adviser fee, and your email address if you want to be copied in on emails to your client, then click **Generate Request**. We'll create a link to give to your client so they can complete the form.

We don't recommend using the Next button below unless you want to prefill additional details on behalf of your client.

Pathfinder will not receive the application until all details are entered and **Submit** has been clicked.

Adviser Code

Test

Adviser Company

Test Ltd

Adviser Fee (0.00 - 0.25) *

0.00%

Adviser Email Address

Test@test.com

Your request has been generated.

Send the request to the person that needs to complete it

Share Link | Copy Link | Open Request

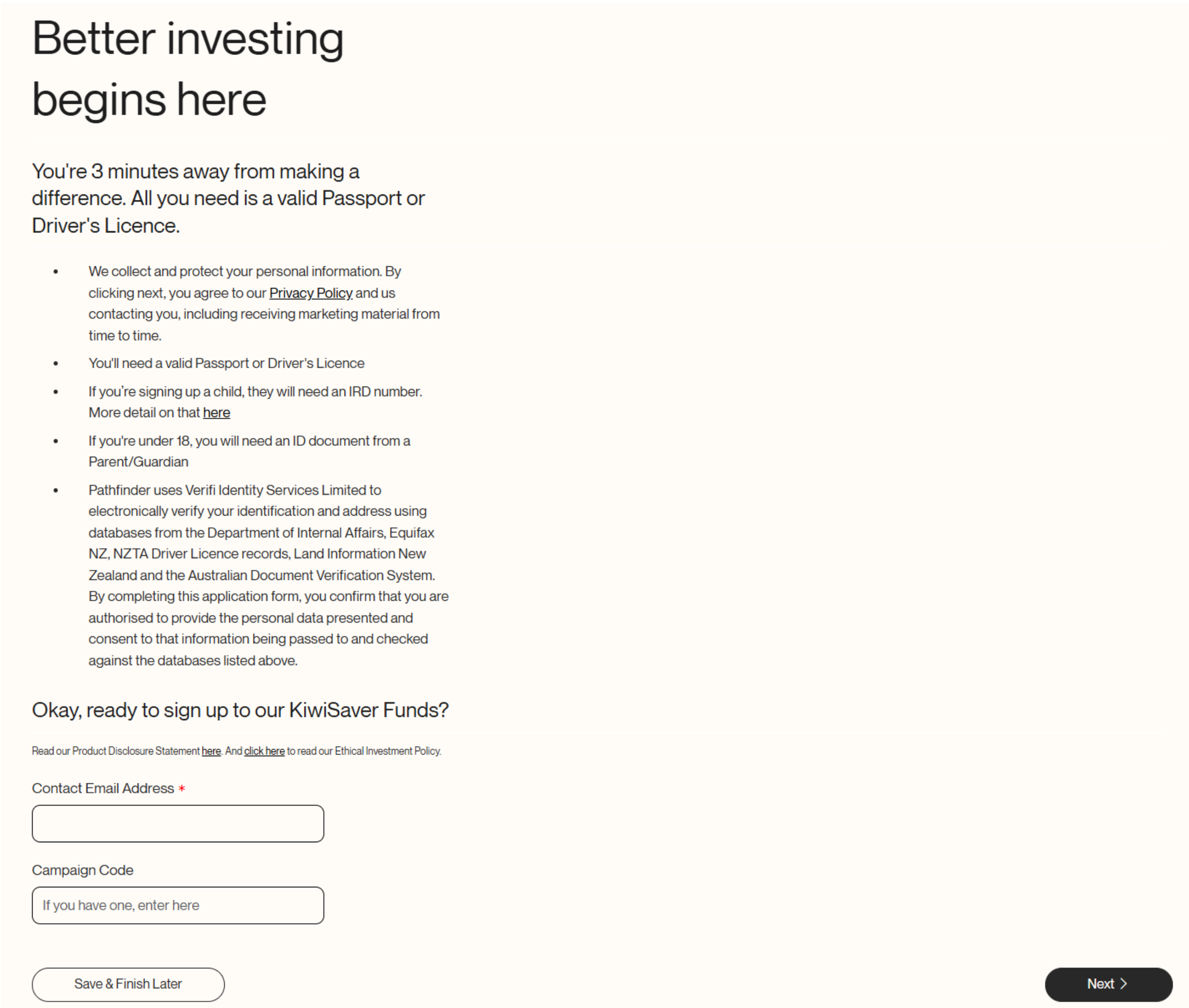
Close

Pathfinder

Step 3:

Once you have chosen the option from above that you would like to use, you can lock in the inputs from the first page. The next page - whether sharing, copying, or opening - is the client facing application form.

From here, use ***only your client's details***. The form is very standardised and contains all the fields you'd expect. See step 5 for additional information relating to signing up a minor.



Better investing begins here

You're 3 minutes away from making a difference. All you need is a valid Passport or Driver's Licence.

- We collect and protect your personal information. By clicking next, you agree to our Privacy Policy and us contacting you, including receiving marketing material from time to time.
- You'll need a valid Passport or Driver's Licence
- If you're signing up a child, they will need an IRD number. More detail on that here
- If you're under 18, you will need an ID document from a Parent/Guardian
- Pathfinder uses Verifi Identity Services Limited to electronically verify your identification and address using databases from the Department of Internal Affairs, Equifax NZ, NZTA Driver Licence records, Land Information New Zealand and the Australian Document Verification System. By completing this application form, you confirm that you are authorised to provide the personal data presented and consent to that information being passed to and checked against the databases listed above.

Okay, ready to sign up to our KiwiSaver Funds?

Read our Product Disclosure Statement here. And click here to read our Ethical Investment Policy.

Contact Email Address *

Campaign Code

If you have one, enter here

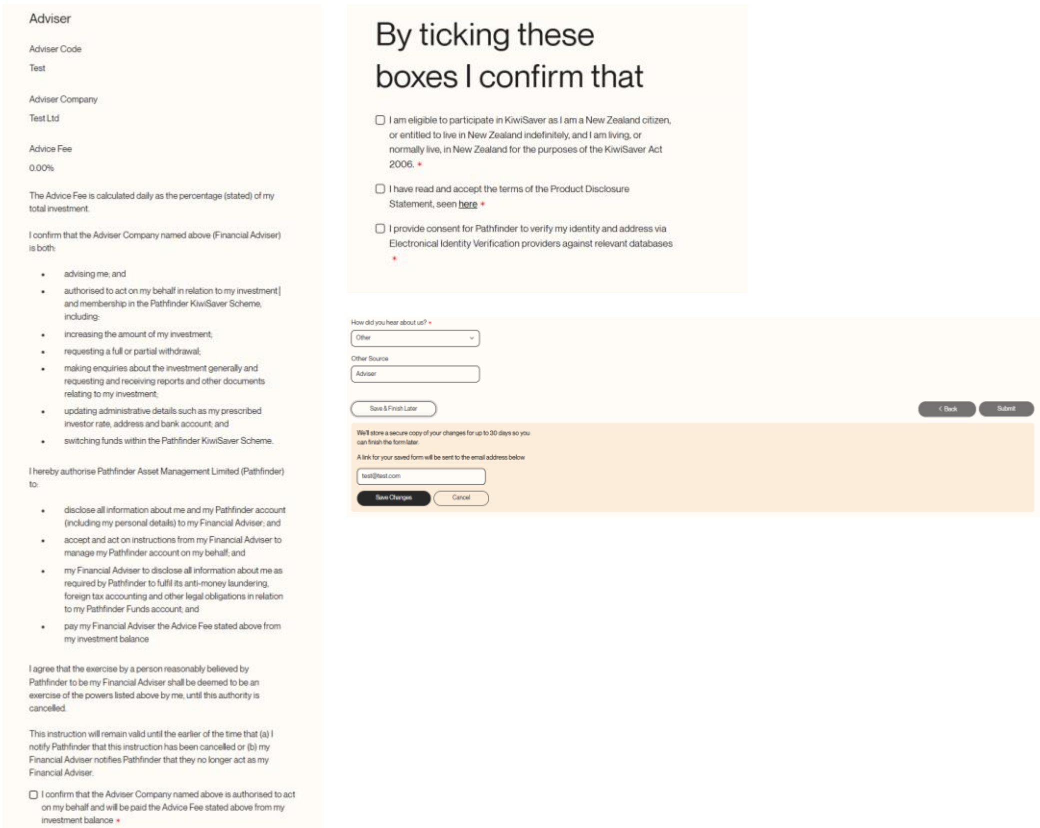
Save & Finish Later

Next >

Step 4:

Additional functionality

At any point after Step 2, you have the option to "save & finish later". Use this button if you'd like to prefill part of the form, but perhaps have the client tick the disclosure confirmations around eligibility and adviser permissions.



If choosing to save and send the form to your client to complete, make sure you mention:

- That your client needs to click "submit" when complete
- That your client will receive reminder emails for four weeks to finish the form.
  (If they haven't submitted after 30 days, their application will be purged, and you'll need to start the process again).

Pathfinder

Step 5:

Other important information:

1. If you would like to split funds, choose one on the application form, then email our team at Adviserhub@pathfinder.kiwi with the split you'd like. Make sure to mention is this split is for current balance, future contributions, or both.

   For example:
   John Smith, ESGXXXXX would like his *XX% of his current balance* to stay in PF Growth and *XX% of future contributions* to be invested in the PF High Growth Fund.

2. If signing up a child, go through the form as mentioned above, when you enter a child's birthday in the DOB field, extra fields will pop up for parent/guardian details. You will still have the functionality to email the form to other parties, allowing parent/guardians to enter their details online and sign digitally. Read these instructions as you move through the form or give our team a call at 0800 ETHICAL (384 422).