




## 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).
3. Enter your client's preferred name for system generated communications.

 **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.

Pathfinder will not receive the application until your client has completed the form and **Submit** has been clicked.

Adviser Code

Adviser Company

Adviser Fee (0.00 - 0.25) \*

Adviser Email Address 

Client Name \*

[Prefill other details \(optional\) >](#) [Generate Request](#)



## 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.

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.

Pathfinder will not receive the application until your client has completed the form and **Submit** has been clicked.

Adviser Code

Adviser Company


Adviser Fee (0.00 - 0.25) \*


Adviser Email Address ?


Client Name \*

✔ Your request has been generated.

Send the request to the person that needs to complete it

 Share Link

 Copy Link

 Open Request



### 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, complete the form using **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

Join the Pathfinder KiwiSaver Plan.

Read our Product Disclosure Statement [here](#). And [click here](#) to read our Ethical Investment Policy.

Contact Email Address \*

Investor Type \*

Campaign Code

- 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

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.

The screenshot displays two parts of the Pathfinder form. The left part is the 'Adviser' section, which includes fields for Adviser Code, Test, Adviser Company, and Advice Fee. It contains a list of actions the adviser is authorized to perform and a section for the user to confirm the adviser's authority. The right part is a confirmation section titled 'By ticking these boxes I confirm that', which contains three checkboxes for eligibility, terms acceptance, and consent to verification. Below this is a 'How did you hear about us?' dropdown menu with 'Other' selected, and an 'Other Source' field containing 'Adviser'. A 'Save & Finish Later' button is visible, along with 'Back' and 'Submit' buttons. At the bottom, there is a note about saving a secure copy of changes for 30 days and an email address field containing 'saw@path.com'.

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).



## 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](mailto: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.**