



Managed Fund Withdrawal: Transfer of Funds Request Form

You can use this form to withdraw from your Pathfinder Managed Fund account and transfer (either all, or part of) the balance to a different Pathfinder account.

Account details - Withdrawal

Name _____ Unitholder Number: PAM _____

Date of Birth _____ Email _____

Postal Address _____

Town/City _____ Country _____ Postcode _____

Home phone _____ Mobile _____

Please provide a reason for this transfer of funds:

Note: Pathfinder is required to ask for this information under the AML/CFT Act 2009 in order to process this withdrawal.

Withdrawal details

Withdrawal amount	Name of the fund
\$	
\$	
\$	
\$	
\$	

Please note, a minimum notice period of three business days is required before a withdrawal can be processed. For withdrawals from the Green Bond Fund, the required notice period is nine business days.

Account details - Recipient

Name _____ Unitholder Number: PAM _____

Email _____

Recipient details

Transfer in amount	Name of the fund
\$	
\$	
\$	
\$	
\$	



Authorisation of withdrawal

Investor Name _____ Investor Signature _____ Date _____

Investor Name _____ Investor Signature _____ Date _____

Investor Name _____ Investor Signature _____ Date _____

Investor Name _____ Investor Signature _____ Date _____

Disclaimer: By typing your name above you are signing this application electronically. You agree that your electronic signature is the legal equivalent of your manual signature and confirm the information stated on this form is correct.

Notes: Pathfinder may request more information in order to process your application, e.g. your certified ID or proof of address (as required by the AML/CFT Act 2009). Please expect a phone call from our Customer Service team to verify this transfer.

If my full balance has been withdrawn/transferred, please close my account.

Where do I send my application to?

Email return:

Please scan this application and email it to us at apply@pathfinder.kiwi or

Postal return:

Please send this application to: Pathfinder Asset Management, PO Box 2673, Auckland 1140.

If you have any questions, please contact 0800 ETHICAL (384 4225).

Withdrawal requests are typically processed and will reach the chosen transfer account within **10 business days**.

