

Use this form to change your membership category, join the locked section or change your contribution rate.

- Use **form 4** *Stop or restart contributions* to stop or restart contributions to your locked account.
- Use **form 5** *Voluntary contributions* to make a lump sum contribution.

Complete Part A only. Your employer will complete Part B.

PART A

Personal and contact details

Mr	Mrs	Miss	Ms	Dr	Assoc Prof	Prof
Surname				Given names		
Membership number				Date of birth (DD/MM/YYYY)		
Email				IRD number*		
Work phone		Home phone		Mobile		

* **Locked members only** – Inland Revenue requires us to hold IRD numbers for locked members. Note your IRD number here if you haven't provided it to us before.

Complete the relevant section(s) – Payroll will advise you of the date your changes will take effect

1. Change membership category¹

I am currently a Category A member and wish to become a Category B member.

OR

I am currently a Category B member and I wish to become a Category A member. I confirm that my employer is not contributing to another superannuation scheme on my behalf (other than a KiwiSaver scheme). I acknowledge that my employer's contribution on my behalf may be adjusted if I belong to a KiwiSaver scheme.

2. Join the locked section

I wish to apply to become a locked member. (Please make sure you have provided your IRD number above.)

I confirm that I have read and understood the terms and conditions of locked section membership set out in UniSaver's product disclosure statement. In particular, I understand that:

- if I am or become a member of a KiwiSaver scheme, any compulsory employer contributions will be paid into my employer locked account first and the balance, if any, paid into my KiwiSaver scheme and that, if I do not agree with this, compulsory employer contributions will be paid to my KiwiSaver scheme first and any compulsory employer contributions to UniSaver will be reduced accordingly
- generally I will not be permitted to access my savings in my locked accounts until the date I attain New Zealand Superannuation age (currently 65).

See **section 3** for details of the minimum contribution rates applicable to each membership category.

KiwiSaver members: Let us know your KiwiSaver start date if you are joining the locked section. This is to ensure that we correctly process any future government contributions. Please provide confirmation of this date in the form of a print out or screen shot of your KiwiSaver online account or Inland Revenue contribution history.

KiwiSaver start date (DD/MM/YYYY)

¹ You are a **Category A member** if your employer contributes to UniSaver on your behalf and a **Category B member** if your employer does not contribute to UniSaver on your behalf. You may be eligible for KiwiSaver-style compulsory employer contributions of 3% of your salary if you are a member of the locked section of UniSaver.

3. Change contribution rate – subject to the minimum contribution rates shown below

Subject to the minimum contribution rates for my membership category, I wish to change my contribution rate as follows:

Member contributions to:

Member locked account as a % of salary (minimum 3% of salary² – multiples of 0.5% only)

PLUS

Member standard account as a % of salary (minimum of 3% of salary if not contributing to locked account² – multiples of 0.5% only)

Total member contributions as a % of salary

My signature below authorises:

- the changes shown in this form
- deductions from my salary shown in section 3 of this form, if applicable.

Signed MEMBER

Date DD/MM/YYYY

If you have any queries about completing this form, please call 0800 864 724 or email unisaver@mercerc.com.

Scan this form and email it to Payroll/HR for them to complete the employer section.

PART B

Employer to complete

Employer name

Employee's membership number

Date joined locked section DD/MM/YYYY

Employer contributions to employer locked account as a % of salary

Employer subsidy to KiwiSaver scheme as a % of salary

Signed AUTHORISED OFFICER OF THE EMPLOYER

Date DD/MM/YYYY

Email this form to unisaver@mercerc.com

Alternatively, post the form to:

UniSaver New Zealand
c/o Mercer (N.Z.) Limited
PO Box 1849
Wellington 6140

² Your minimum contributions may increase to 4% of your salary if your employer is not contributing at least 1% of your salary. See unisaver.co.nz for more information.