

Application Form – Additional Funds



Investor Details

Investor number

Investor name

Deposit amount \$

Direct credit to BNZ 02-0506-0116828-000 in the name of The New Zealand Guardian Trust Company Limited ASF Clarity Funds and reference with your Investor number.

Clarity Fixed Income Fund \$ Clarity Dividend Yield Fund \$

Clarity New Zealand Equity Fund \$ Clarity Trans-Tasman Value Fund \$

Clarity Global Shares Fund \$ Clarity - Capital Group New Perspective Fund \$

Clarity Diversified Income Fund \$ Clarity Diversified Growth Fund \$

What is the nature and purpose of the investment, for example, income generation, capital gain or retirement savings?

Source of Funds/Wealth

Please tell us the original source of the funds/wealth you are investing with us.

Property sale Gift/Inheritance Business activity Accumulated savings Trust income Other (describe below)

Please provide details include dates and amounts. For example, sale of family home at address for amount on date.

Note we may ask for additional information to support your application.

In the last 12 months, has any individual associated with the investor, or an immediate family member, held a prominent public position in any overseas country? For example, high level judicial or military role, ministerial role, diplomat role or senior executive of a state run/owned enterprise. If "Yes", please specify:

Investor Authorisation

Signature of Investor or Authorised Signatory

Date

Signature of Investor or Authorised Signatory

Date

Signature of Investor or Authorised Signatory

Date

Signature of Investor or Authorised Signatory

Date

It will normally take up to seven working days to invest your funds. Please ensure you read Clarity Funds Product Disclosure Statement to obtain more information available at www.clarity.co.nz.