

BONUS BONDS APPLICATION FORM



EXISTING BONDHOLDER NUMBER

8	4	1									
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1. Complete this section if you are:

purchasing Bonus Bonds for yourself or a child in your care (for any value); OR
purchasing Bonus Bonds for another person with the bonds to be issued in their name (to a maximum value of \$1,000 – use Section 2 for amounts over \$1,000).

BONDHOLDER (person/s in whose name the bonds are to be issued)

Title _____ First names _____ Surname _____ Date of birth ____/____/____
_____/_____/_____

PARENT/GUARDIAN (for children under the age of 15)

Title _____ First names _____ Surname _____ Date of birth ____/____/____
_____/_____/_____

Please tick if you are buying these Bonus Bonds for another person.

2. Complete this section when purchasing Bonus Bonds with the intention of transferring them to another person. Includes amounts over \$1,000 intended for another person.

PURCHASER

Title _____ First names _____ Surname _____ Date of birth ____/____/____
_____/_____/_____

INTENDED RECIPIENT (person you intend to transfer the Bonus Bonds to)

Title _____ First names _____ Surname _____

3. Complete this section for all purchase types.

Mailing address _____
_____ Post code _____

Residential address _____ Post code _____
(if different to mailing address)

Alternative mailing address _____ Post code _____
(where the purchaser is not the bondholder and would like the Bonus Bonds certificate mailed to them to hand to the bondholder, e.g. when purchasing Bonus Bonds as a gift)

Phone Home () Work () Mobile ()

Preferred number for contact (circle) H W M

Email address _____ Alternative email address _____

MARKETING COMMUNICATION (please tick as appropriate):

From time to time, I would like to receive marketing communications (including emails) about Bonus Bonds
I understand that I can unsubscribe at any time (emails will contain instructions for this)

PRIZE PAYMENT METHOD * Prizes must be reinvested when purchasing for another person who is not present to provide identification.

I would like any prizes to be (please select one):

Reinvested into Bonus Bonds

Deposited to account _____ at the _____ branch of _____ bank

VALUE OF PURCHASE I/we apply for Bonus Bonds to the value of \$ _____ (Note: minimum of \$20 and any amount of whole dollars thereafter)

SIGNING INSTRUCTIONS AND ACKNOWLEDGEMENTS

I/we apply for units in The Bonus Bonds Trust (section 1 – purchasing for yourself or a child in your care).

OR

I/we apply for units in The Bonus Bonds Trust on behalf of the recipient as noted above. I/we acknowledge that the recipient/s will be the Bondholder/s of the Bonds Bond Units and be entitled to any rights, prizes and repayments pertaining to the Units (section 1 – purchasing for another person with the Bonds to be issued in their name).

OR

I/we wish to apply for units in The Bonus Bonds Trust and intend to transfer them to the named recipient above. I/we acknowledge that I/we am/are the bondholder/s of the Bonus Bonds Units and am/are entitled to any rights, prizes and repayments pertaining to the Units until the transfer of the units to the recipient has been completed (section 2 – purchasing with the intention of transferring them to another person).

I/we acknowledge that I/we have read and agree to the Terms and Conditions and Privacy Statement overleaf and that those Terms and Conditions and Privacy Statement shall apply to all future applications made by me/us for units in the Bonus Bonds Trust. The purchaser/s must always sign. If the purchaser/s is/are under 15 years of age, their parent/guardian MUST sign unless the parent/guardian has signed the Request for Minor to have Operating Authority form, in which case the purchaser/s MUST sign.

BRANCH STAMP

Specific signing instructions One to sign Two must sign All must sign

Signature _____ Dated ____/____/____

ID1 type and number _____ ID1 expiry date ____/____/____

ID2 type and number _____ ID2 expiry date ____/____/____
(ID details are mandatory for new and previously unidentified authorised signatories)

Signature _____ Dated ____/____/____

ID1 type and number _____ ID1 expiry date ____/____/____

ID2 type and number _____ ID2 expiry date ____/____/____
(ID details are mandatory for new and previously unidentified authorised signatories)



TERMS AND CONDITIONS

Bonus Bonds are units in The Bonus Bonds Trust, a unit trust. They are governed by a Trust Deed between ANZ Investment Services (New Zealand) Limited (“the Manager”) and Trustees Executors Limited and a registered prospectus.

Any purchase of Units in The Bonus Bonds Trust is subject to the terms and conditions contained in the Trust Deed and the registered prospectus (as duly amended from time to time). Below is intended as an introduction to investing in Bonus Bonds. For full details of the terms and conditions please see the Trust Deed and registered prospectus.

A copy of the Trust Deed may be inspected free of charge at the Secretary’s Dept, ANZ National Bank Limited, Level 6, 1 Victoria Street, Wellington, during normal business hours. A copy of the registered prospectus can be obtained free of charge from any ANZ branch, your local PostShop or www.bonusbonds.co.nz.

NO GUARANTEE

The principal and returns of Bonus Bonds are not guaranteed or secured in any way by ANZ National Bank Limited, any member of the ANZ Group or any other person. Units do not represent deposits or liabilities of ANZ National Bank Limited or any other member of the ANZ Group. Bonus Bonds are subject to investment risk, including possible delays in repayment and loss of income and principal invested. Bonus Bonds investment portfolio is rated by Standard & Poor’s, with full details of the current fund credit rating available on www.bonusbonds.co.nz and within the Bonus Bonds registered prospectus.

PURCHASE OF BONUS BONDS

The minimum number of Bonus Bonds that must be purchased is currently 20 and then any whole number thereafter. It is intended that each Bonus Bond issued is purchased for \$1. Factors that may cause the unit price to deviate from \$1 are detailed in the registered prospectus.

BONUS BONDS CUSTOMER CARD

If you are issued with a Bondholder Card, you must keep this card safe and only allow it to be used to purchase Bonus Bonds for the person/s in whose name/s the first purchase of Bonus Bonds are registered.

RETURNS

Investment returns in The Bonus Bonds Trust are placed in a pool and distributed as prizes to holders of Bonus Bonds that are selected, at random, in the monthly prize draws. In any month, the number of Bonus Bonds prizes and total payout are subject to change. There is no guarantee that you will win a prize.

ELIGIBILITY FOR PRIZE DRAWS

Each Bonus Bond purchased by you becomes eligible for the monthly prize draws at the end of the first complete calendar month following the date of purchase. For example, Bonus Bonds purchased in March will be included in prize draws from the beginning of May onwards. Bonus Bonds will continue to be eligible for prize draws up to and including the draw announced in the month you apply to redeem them.

PAYMENT OF PRIZES

You can choose to have any prizes you win paid to your New Zealand bank account or applied to purchase further Bonus Bonds. If prize payments do not complete, e.g. customer’s bank account has been closed, or if your identity has not been established in a manner satisfactory to the Manager, the prize money will automatically be used to purchase more Bonus Bonds in your name. Once your identity has been established in a manner satisfactory to the Manager, you may redeem any prizes and change your prize payment method. Prizes that are less than \$25 may automatically be used to purchase more Bonus Bonds in your name.

REDEMPTIONS

You can redeem Bonus Bonds by completing a redemption request at any ANZ branch or your local PostShop. If your identity has not been previously established in a manner satisfactory to the Manager, the redemption request may also require you to provide one form of photographic or two forms of non-photographic identification prior to the repayment being processed. Repayment will generally be made within 28 days of the Bonus Bonds Centre receiving a properly completed redemption request. It is intended but not guaranteed that \$1 be paid out for each Bonus Bond redeemed. The value of units is subject to change in the value of underlying investments however the Manager anticipates that units will remain at \$1 through varying market circumstances due to the conservative mix of investments held by the Bonus Bonds Trust. Factors that may cause the unit price to deviate from \$1 are detailed in the registered prospectus.

PRIVACY STATEMENT

Information that you provide will be held securely by ANZ Investment Services (New Zealand) Limited (“ANZIS”) and ANZ National Bank Limited (“the Bank”). You may access and correct this information at any ANZ branch. A fee may be payable.

ANZIS will use this information to administer your Bonus Bonds holdings, to comply with legal and regulatory requirements and (unless you disagree) to introduce other products or services to you including third party products and conduct market research.

ANZIS may disclose this information to its agents (and their delegates), the Bank and the Bank’s related companies (as defined by the Companies Act 1993) for the above purposes. Should you no longer wish to receive information on other products and services or participate in market research, you can visit an ANZ Branch or call Bonus Bonds on 0800 BONDS 4 U (0800 266 374) to withdraw your consent. ANZIS may also disclose this information to government agencies and other financial institutions to comply with legal and regulatory requirements.

ANZIS may request the Bank or one of the Bank’s related companies to disclose to ANZIS information about you for the purpose of enabling ANZIS to comply with legal and regulatory requirements (including identity verification requirements). By becoming a holder of Bonus Bonds you agree to such disclosure.

ANZIS may contact the source of any information that you provide in support of your application in order to check the accuracy of the information.

FURTHER INFORMATION

As well as the Terms and Conditions set out in the Trust Deed and registered prospectus, customers can request further information by telephone to Bonus Bonds on 0800 BONDS 4 U (0800 266 374) or visit the Bonus Bonds website (www.bonusbonds.co.nz).