

Other material information – Membership

This document relates to the Kiwi Wealth Super Scheme ('Scheme') and should be read in conjunction with the Scheme's Product Disclosure Statement.

In this document, Kiwi Wealth Investments Limited Partnership ('we', 'our', or 'us') provides a general overview of how to join the Scheme.

The information in this document could change in the future. Please check the offer register at www.disclose-register.companiesoffice.govt.nz for any updates.

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Overview

Employees may be able to join the Scheme either through an employer plan established by their employer (see "Participating Employers" below), or by joining directly (see "Individuals" below).

People who are employed by a non-participating employer, are self-employed or not employed may be able to join by signing up directly (see "Individuals" below).

Individuals

Personal Members

Any individual can join the Scheme as a member of the personal section of the Scheme ('Personal Member'), as long as they:

- are New Zealand tax-resident; and
- make an initial contribution (by direct debit, cheque, or transfer from another New Zealand or overseas scheme) of at least \$50.

Employer Members

Any individual can join the Scheme as a member of the employer section of the Scheme ('Employer Member') if they:

- are an employee or director of a Participating Employer (see below), or provide personal services (other than as an employee) principally to a Participating Employer; and
- meet any additional conditions of eligibility contained in the relevant Participation Agreement. See the product disclosure statement supplement given to you with the Scheme's Product Disclosure Statement ('Supplement') for any conditions of eligibility.

If you are eligible to join the Scheme as an Employer Member, you will be given a Supplement with the Scheme's Product Disclosure Statement. To join via a Participating Employer, you should read that Supplement provided to you.

All members

To sign up directly you must complete the application form at the back of the Product Disclosure Statement. This will require personal, address and tax information and will need to be supported by identity and address verification documents.

You currently cannot be both an Employer Member and a Personal Member.

Participating Employers

Any employer who is invited by us may participate in the Scheme as a participating employer ('Participating Employer'). Participating Employers establish a plan within the Scheme for their eligible employees.

Any employer who applies to participate in the Scheme as a Participating Employer must, if we require:

- provide all relevant information we request;
- agree with us the terms that will govern the membership of the Scheme for its employees within the parameters set out in the trust deed for the Scheme ('Trust Deed'); and
- complete and sign an agreement with us which sets those terms out ('Participation Agreement').

Each Participation Agreement will contain the following:

- the conditions of eligibility for membership;
- the contributions to be paid by members and the Participating Employer;
- the options available for investment of contributions;
- any fees payable; and
- any other provisions or rules for members who are employees of the Participating Employer provided that such provisions or rules do not jeopardise the employer section's status as a workplace saving scheme under the Financial Markets Conduct Act 2013.

From the date specified in your employer's Participation Agreement your employer will become an employer participating in the Scheme and will be bound by the Trust Deed and the Participation Agreement.