

## Forms that can be accepted with an electronic signature

### Products:

Elevate, Flexible Lifetime Protection, Risk Protection, ACL, Provider, Flexipol & Goldline

| Customer request form  | Can be electronically signed? |           |
|--|-------------------------------|-----------|
| Add/Delete authorised officer form   | Yes                           |           |
| Alteration form – CLAS   | Yes                           |           |
| AMP Adviser code request form  | Yes                           |           |
| Application for replacement plan   | Yes                           |           |
| Authority to change your servicing adviser   | Yes                           |           |
| Beneficiary nominations  |                               | No        |
| Change of name   |                               | No        |
| Change to member preference form   | Yes                           |           |
| Change of personal details form  | Yes                           |           |
| Compassionate Grounds  | Yes                           |           |
| Completing the request to transfer superannuation benefits from an external fund to AMP                        | Yes                           |           |
| Consent to disclose policy information, also known as Third Party Authority request                            | Yes                           |           |
| DASP application (ATO version)   | Yes                           |           |
| <b>Direct debit request/form</b>   | <b>Yes</b>                    |           |
| Family law split instructions  | Yes                           |           |
| Financial hardship applications  | Yes                           |           |
| Future Insurability benefit for Life, Total and Permanent Disability (TPD) and Trauma insurance form (80051.0) | Yes                           |           |
| <b>Insurance decrease and/or cancellation request</b>  | <b>Yes</b>                    |           |
| <b>Increase/alteration/addition application</b>  |                               | <b>No</b> |
| Internal rollover/transfer request   | Yes                           |           |
| Investment switch  | Yes                           |           |
| KiwiSaver Transfer form  | Yes                           |           |
| <b>Know Your Customer (KYC)</b>  |                               | <b>No</b> |
| Member contribution form   |                               |           |
| Non-smoking declaration form   | Yes                           |           |
| Notice of intent to claim a tax deduction  | Yes                           |           |
| Notice of intent to claim or vary a deduction for personal super contributions (ATO version)                   | Yes                           |           |
| Personal statement   | Yes                           |           |
| <b>Policy/plan cancellation request</b>  | <b>Yes</b>                    |           |
| <b>Quote/illustration</b>  | <b>Yes</b>                    |           |
| Rollover out request   | Yes                           |           |
| Smoker status declaration  | Yes                           |           |
| Statutory Declaration  |                               | No        |
| <b>Transfer of Ownership Form</b>  |                               | <b>No</b> |
| Tax file number declaration  | Yes                           |           |
| <b>Transfer Ownership of Policy (80046)</b>  |                               | No        |
| Transfer of servicing rights   | Yes                           |           |
| Transfer of UK pension scheme funds  |                               |           |
| Withdrawal application forms – all types Note: forms only, does not include KYC                                | Yes                           |           |

## Products

Allocated Pension Plan, Personal Super Directions & Retirement Bond

| <b>Customer request form</b>   | <b>Can be electronically signed?</b> |           |
|--|--------------------------------------|-----------|
| Add/Delete authorised officer form   | Yes                                  |           |
| AMP Adviser code request form  | Yes                                  |           |
| <b>Application for replacement plan</b>  | <b>Yes</b>                           |           |
| Authority to change your servicing adviser   | Yes                                  |           |
| <b>Applications for Unclaimed Monies – Ordinary (NS7050B)</b>  |                                      | <b>No</b> |
| Beneficiary nominations  |                                      | No        |
| Change of name   |                                      | No        |
| Change to member preference form   | Yes                                  |           |
| Change of personal details form  | Yes                                  |           |
| Compassionate Grounds  | Yes                                  |           |
| Completing the request to transfer superannuation benefits from an external fund to AMP                        | Yes                                  |           |
| Consent to disclose policy information, also known as Third Party Authority request                            | Yes                                  |           |
| DASP application (ATO version)   | Yes                                  |           |
| Direct debit request   | Yes                                  |           |
| Family law split instructions  | Yes                                  |           |
| Financial hardship applications  | Yes                                  |           |
| Future Insurability benefit for Life, Total and Permanent Disability (TPD) and Trauma insurance form (80051.0) | Yes                                  |           |
| Internal rollover/transfer request   | Yes                                  |           |
| Investment switch  | Yes                                  |           |
| KiwiSaver Transfer form  | Yes                                  |           |
| <b>Know Your Customer (KYC)</b>  |                                      | <b>No</b> |
| Non-smoking declaration form   | Yes                                  |           |
| Notice of intent to claim a tax deduction  | Yes                                  |           |
| Notice of intent to claim or vary a deduction for personal super contributions (ATO version)                   | Yes                                  |           |
| Policy endorsement annexure (Insurance Bond Memorandum of transfer)  |                                      | No        |
| Personal statement   | Yes                                  |           |
| Rollover out request   | Yes                                  |           |
| Smoker status declaration  | Yes                                  |           |
| Statutory Declaration  |                                      | No        |
| Tax file number declaration  | Yes                                  |           |
| Transfer of servicing rights   | Yes                                  |           |
| <b>Transfer Ownership of Policy (80046)</b>  |                                      | <b>No</b> |
| Withdrawal application forms – all types Note: forms only, does not include KYC                                | Yes                                  |           |

## Products

Conventional & Term, Business and Insurance, Retirement Security Plan & Flexible Security Plan

| <b>Customer request form</b>   | <b>Can be electronically signed?</b> |           |
|--|--------------------------------------|-----------|
| Add/Delete authorised officer form   | Yes                                  |           |
| Alteration form – RSP  | Yes                                  |           |
| AMP Adviser code request form  | Yes                                  |           |
| Application for replacement plan   | Yes                                  |           |
| <b>Applications for Unclaimed Monies – Ordinary (NS7050B)</b>  |                                      | <b>No</b> |
| Beneficiary nominations  |                                      | No        |
| Change of name   |                                      | No        |
| Change to member preference form   | Yes                                  |           |
| Change of personal details form  | Yes                                  |           |
| Compassionate Grounds  | Yes                                  |           |
| Completing the request to transfer superannuation benefits from an external fund to AMP                        | Yes                                  |           |
| Consent to disclose policy information, also known as Third Party Authority request                            | Yes                                  |           |
| DASP application (ATO version)   | Yes                                  |           |
| Direct debit request   | Yes                                  |           |
| Family law split instructions  | Yes                                  |           |
| Financial hardship applications  | Yes                                  |           |
| Future Insurability benefit for Life, Total and Permanent Disability (TPD) and Trauma insurance form (80051.0) | Yes                                  |           |
| Internal rollover/transfer request   | Yes                                  |           |
| Investment switch  | Yes                                  |           |
| KiwiSaver Transfer form  | Yes                                  |           |
| <b>Know Your Customer (KYC)</b>  |                                      | <b>No</b> |
| Non-smoking declaration form   | Yes                                  |           |
| Notice of intent to claim a tax deduction  | Yes                                  |           |
| Notice of intent to claim or vary a deduction for personal super contributions (ATO version)                   | Yes                                  |           |
| Personal statement   | Yes                                  |           |
| Rollover out request   | Yes                                  |           |
| Smoker status declaration  | Yes                                  |           |
| Statutory Declaration  |                                      | No        |
| Tax file number declaration  | Yes                                  |           |
| Transfer of servicing rights   | Yes                                  |           |
| <b>Transfer Ownership of Policy (80046)</b>  |                                      | <b>No</b> |
| Withdrawal application forms – all types Note: forms only, does not include KYC                                | Yes                                  |           |

## Products

North

| <b>Customer request form</b>              | <b>Can be electronically signed?</b> |    |
|---|--------------------------------------|----|
| Account Transfer                          | Yes                                  |    |
| Adviser change                            | Yes                                  |    |
| ATO Release Authority                     |                                      | No |
| Binding Nomination of beneficiary         |                                      | No |
| Change of name                            | Yes                                  |    |
| Communications preferences                | Yes                                  |    |
| Compassionate ground form                 | Yes                                  |    |
| Contributions split                       | Yes                                  |    |
| Direct Debit Deposit                      | Yes                                  |    |
| Dollar cost averaging setup               | Yes                                  |    |
| Family Law Split                          | Yes                                  |    |
| Financial Hardship Claim                  | Yes                                  |    |
| Guarantee addition                        | Yes                                  |    |
| Guarantee removal                         | Yes                                  |    |
| In specie In                              |                                      | No |
| In specie out                             |                                      | No |
| Insurance maintenance                     | Yes                                  |    |
| Investment profile update                 | Yes                                  |    |
| Investment Switch                         | Yes                                  |    |
| Merging accounts under one client ID      | Yes                                  |    |
| New Business setup                        | Yes                                  |    |
| Permanent Incapacity claim                | Yes                                  |    |
| Power of attorney appointment             | Yes                                  |    |
| Regular savings plan setup                | Yes                                  |    |
| Regular withdrawals plan set up           | Yes                                  |    |
| Rollover to APRA Fund                     | Yes                                  |    |
| Rollover to SMSF                          | Yes                                  |    |
| Notice of Intent to claim a tax deduction | Yes                                  |    |
| Tax file number update                    | Yes                                  |    |
| Third Party authority                     | Yes                                  |    |
| TPD Claim                                 | Yes                                  |    |
| Update Bank Details                       | Yes                                  |    |
| Withdrawal (Full and Partial)             | Yes                                  |    |

## Product

Simple Super Rollover Plan, Tailored Super Rollover Plan, Simpler Super, Super Directions for Business, Super Directions Rollover Section & Tailored Super

| <b>Customer request form</b>   | <b>Can be electronically signed?</b> |           |
|--|--------------------------------------|-----------|
| Add/Delete authorised officer form   | Yes                                  |           |
| AMP Adviser code request form  | Yes                                  |           |
| Application for replacement plan   | Yes                                  |           |
| Authority to change your servicing adviser   | Yes                                  |           |
| Beneficiary nominations  |                                      | No        |
| Change of name   |                                      | No        |
| Change to member preference form   | Yes                                  |           |
| Change of personal details form  | Yes                                  |           |
| Change in name/Business structure questionnaire  | Yes                                  |           |
| Compassionate Grounds  | Yes                                  |           |
| Completing the request to transfer superannuation benefits from an external fund to AMP      | Yes                                  |           |
| Consent to disclose policy information, also known as Third Party Authority request          | Yes                                  |           |
| DASP application (ATO version)   | Yes                                  |           |
| Direct debit request   | Yes                                  |           |
| Employment ceased form   | Yes                                  |           |
| Enduring rollover authority  | Yes                                  |           |
| Family law split instructions  | Yes                                  |           |
| Financial hardship applications  | Yes                                  |           |
| Internal rollover/transfer request   | Yes                                  |           |
| Investment switch  | Yes                                  |           |
| KiwiSaver Transfer form  | Yes                                  |           |
| <b>Know Your Customer (KYC)</b>  |                                      | <b>No</b> |
| Non-smoking declaration form   | Yes                                  |           |
| Notice of intent to claim a tax deduction  | Yes                                  |           |
| Notice of intent to claim or vary a deduction for personal super contributions (ATO version) | Yes                                  |           |
| Personal statement   | Yes                                  |           |
| Rollover out request   | Yes                                  |           |
| Smoker status declaration  | Yes                                  |           |
| Statutory Declaration  |                                      | No        |
| Super Online application   | Yes                                  |           |
| Tax file number declaration  | Yes                                  |           |
| Transfer of servicing rights   | Yes                                  |           |
| Withdrawal application forms – all types Note: forms only, does not include KYC              | Yes                                  |           |