MILFORD
INVESTED IN YOU

Milford Investment Funds
Regular Withdrawal Request Form

This form should only be completed if you wish to establish a regular withdrawal from your Milford Investment Funds account. Regular withdrawal for all Funds occurs on the 15th of each month or the next business day. The minimum amount per withdrawal is $200.

Once complete please return this form to:
Milford Funds Ltd, PO Box 960, Shortland Street, Auckland 1140 or via email to **transactions@milfordasset.com**

Account Details

ACCOUNT NUMBER

M L ☐ ☐ ☐ ☐ ☐ ☐

ACCOUNT NAME

☐

Regular Withdrawal Details

TOTAL WITHDRAWAL AMOUNT

$

FREQUENCY

☐ Monthly ☐ Quarterly ☐ 6 Monthly ☐ Annually

Please indicate the withdrawal amount that should be taken from each fund:

Milford Conservative Fund	$	Milford Cash Fund	$
Milford Diversified Income Fund	$	Milford Trans-Tasman Bond Fund	$
Milford Balanced Fund	$	Milford Global Corporate Bond Fund	$
Milford Active Growth Fund	$	Milford Global Equity Fund	$
Milford Australian Absolute Growth Fund	$	Milford Trans-Tasman Equity Fund	$
Milford Aggressive Fund	$	Milford Dynamic Fund	$

JO01186

Bank Account Details

If you have not previously provided your bank account details, including proof of the bank account, or your bank account has changed, please complete the section below and **provide proof of your bank account** (refer below) along with this form.

Please note withdrawals will only be paid into a New Zealand domiciled bank account which is in the same name as your Milford Funds holding. We are unable to make payments to third party or international bank accounts.

ACCOUNT NAME (Must be in the same name as your Milford Funds holding)

BANK

BRANCH

ACCOUNT NUMBER

BANK BRANCH ACCOUNT NUMBER SUFFIX

Proof of bank account

Must be one of the following:

- ☐ Bank statement dated within the last 12 months
- ☐ Bank deposit slip
- ☐ Online bank summary page or transaction history, dated within the last 12 months
- ☐ Deposit receipt, account summary or transaction receipt, dated within the last 12 months and must be stamped by the bank
- ☐ Bank correspondence with the account name and account number, dated within the last 12 months

JO01186

Authorisation

Please be aware Milford requires a certified copy of identification to process a withdrawal. If Milford does not have this documentation on file you will need to provide it. A list of acceptable identification documents can be found at http://milfordasset.com/investing/id-requirements/

INVESTOR NAME

INVESTOR SIGNATURE

DATE
/ /

INVESTOR NAME

INVESTOR SIGNATURE

DATE
/ /

INVESTOR NAME

INVESTOR SIGNATURE

DATE
/ /

INVESTOR NAME

INVESTOR SIGNATURE

DATE
/ /

JO01186