
Guidelines: Investment on behalf of a minor

Should you wish to make an investment on behalf of a minor, please read these guidelines carefully before completing an application form.

When investing on behalf of a minor, the legal ownership of the account will remain with yourself (the “applicant”). This means the applicant will have the ability to redeem the account, invest further and make any decisions relating to the conduct of the account. While the applicant retains full ownership, this account can be ‘nicknamed’ in the name of the minor, e.g. Aroha’s account, Jackson’s account, Aroha and Jackson’s account.

To invest on behalf of a minor, ensure you have fulfilled all requirements and gathered all necessary documents. Review the application checklist below to ensure you have all elements for your application. Send your completed application to

info@norfolktrust.co.nz

or

Norfolk Mortgage Management Limited
PO Box 37341
Parnell
Auckland 1151

Application checklist

- Completed Application Form 1, listing yourself as Investor 1
- Certified identification documents, as stated in the application form instructions
- Bank account details and Prescribed Investor Rate (PIR)
- Payment has been arranged
- Email or covering letter informing us of the nickname for the account