

SBS Wealth Investment Funds

Lump Sum Deposit Details



To deposit lump sums into your account via online banking, simply use the details provided below.

All lump sums will be allocated to your account based on your investment profile.

Your investment profile is your Strategy or self-selected allocation to each Fund(s) at the point of application for units unless we are instructed otherwise.

We will only accept deposits from your nominated bank account. If you make a deposit from a different bank account, your deposit may be delayed or returned.

Should additional information be required to process your transaction, we will be in touch. You do not need to complete this form and return this to us.

Online account details

Payee Name	SBS WEALTH INVESTMENT FUNDS
Payee Account Number*	02-0500-0423317-000
Particulars	[ACCOUNT NAME]
Reference	[SBS WEALTH INVESTMENT FUNDS ACCOUNT NUMBER]
Code**	[IRD NUMBER]

*This is the cash account of the custodian.

**For joint account holders only one IRD number from either party is required.

Not sure where to find this information?

You can find your Investment Funds name and account number by logging into your online account or checking your account statement.

Email us at contact@sbswealth.co.nz or phone us on **0800 727 935** if you need a hand locating your account information.

Wish to make regular deposits?

If you wish to make regular deposits to your SBS Wealth Investment Funds account then please complete the Authority to Accept Direct Debits form instead located at <https://www.sbswealth.co.nz/investment-funds/investment-funds-document-library/>