ACTIVE INVESTOR PLUS VISA

ACCEPTABLE MANAGED FUND APPLICATION FORM
– SINGLE ASSET FUND ADDENDUM

NEW ZEALAND INVEST

This addendum should be completed and submitted by a Managed Fund that invests in a single asset and is applying to be included on the acceptable Managed Fund list published by Invest New Zealand (**Invest NZ**) for the purposes of the Active Investor Plus (**AIP**) Visa. This addendum will allow Invest NZ to understand whether the underlying investment would meet the Objective and Principles of the AIP visa. This addendum will be read together with, and forms part of, your AIP Visa Acceptable Managed Fund Application Form (**Application Form**). To avoid duplication, where you have already provided the information requested below in your Application Form, please cross refer to those responses in this addendum.

Any references to 'we' or 'us' in this application are to Invest NZ and references to 'you' or 'your' in this application are to the applicant.

Please email the application form plus any supporting documentation to AIPacceptableinvestments@investnz.govt.nz.

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Section One: Investee Entity details	
1.	**Legal name of Investee Entity (that the Managed Fund is investing into)**
2.	**Link to the Investee Entity on the Companies Office website**
3.	**Investee Entity Address**

Section Two: Further information on the Investee Entity	
4.	**Please insert a description of the Investee Entity's principal activity and operating model to show alignment with Principle 1 (please see section 2c of the managed fund guidance note)**
	(a) Principal Activity and Operating Model of Investee Entity

	(b) Alignment with Principle 1 (please see section 2c of the managed fund guidance note) e.g. increase in economic output, creating more jobs, saving jobs, increasing productivity or growth (OPEX), investment into productive asset (CAPEX), investment into intangible assets (i.e. research and development or other intellectual property), other impacts.
5.	**Confirm you have completed and attached the financial summary template, including commentary, (link here) for the Investee Entity.** ☐ Yes ☐ No
6.	**Please provide an explanation of how the Investee Entity provides a positive ESG lens to its business activities to show alignment with Principle 3 (does not prejudice New Zealand's reputation as a responsible member of the world community.** **(a) Environmental** **(b) Social**

	(c) Governance
	(d) Other
7.	**Any other information relevant to your application (please include reference to any additional documents provided here):**

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Section Two: Applicant declaration

8. **By signing this addendum:**

(a) You declare that you have the authority to submit this addendum on behalf of the organisation identified in your application.

(b) You declare that the information given in this addendum, or supplied by you in support of your application, is true and correct to the best of your knowledge.

(c) To the maximum extent permitted by law, you indemnify Invest NZ (and its employees, agents and nominees) against any loss they suffer as a result of you providing incorrect or incomplete information.

(d) You confirm that you have read and agree to:

a. Invest NZ's Terms of Use and Engagement and confirm that you are authorised to legally bind the applicant to these terms.

b. Invest NZ's Privacy Policy and acknowledge that any personal information provided in this addendum will be collected and used for the purposes of assessing your application. Information you provide to us may be disclosed to Immigration New Zealand for the purposes of administering the Active Investor Plus visa process in accordance with the Invest NZ Privacy Policy. You also agree that while disclosure of personal information in this application form is voluntary, if you do not provide the information we ask for, we may not be able to accept your application.

Full name of the applicant: *Submitting this addendum on behalf of the Managed Fund*	
Position/designation in organisation:	
Signature:	
Date:	