

Welcome To Summer Kiwisaver's New Member Portal

Getting Started for the First Time

Your member details have been transferred across to our new portal. To log into the new portal, you will use your registered email address as your username.

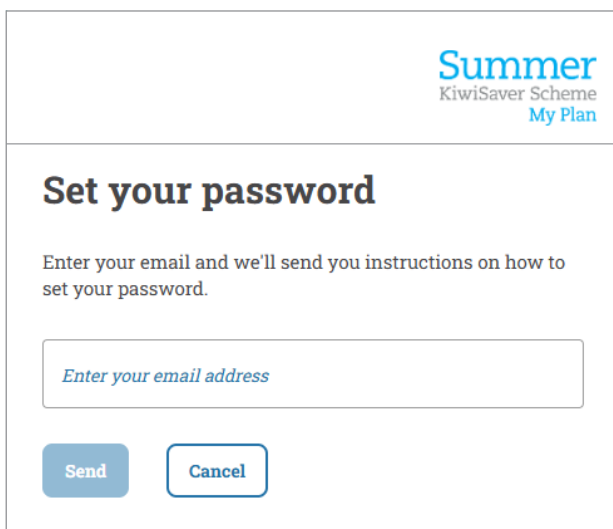
Important note:

You will need to have your own unique email address registered on your profile to access the new investor portal.

If you currently use a shared email address to log into the existing portal, please reach out to the Summer KiwiSaver Client Services team (info@summer.co.nz) to update your registered email address so you can log in.

Step 1: Setting up your password

1. Go to the following link:
<https://secure.summer.co.nz/auth/setuppassword>
2. Enter your registered email address and click 'Send'



3. An email will be sent to your email address from Adminis, outlining the steps to set up your new password.
4. Once the password has been reset, you can now access your portfolio.

NB. you will know you have successfully reset/set your password when you receive an email confirming this.

Password requirements

The same password requirements apply to both old and new logins:

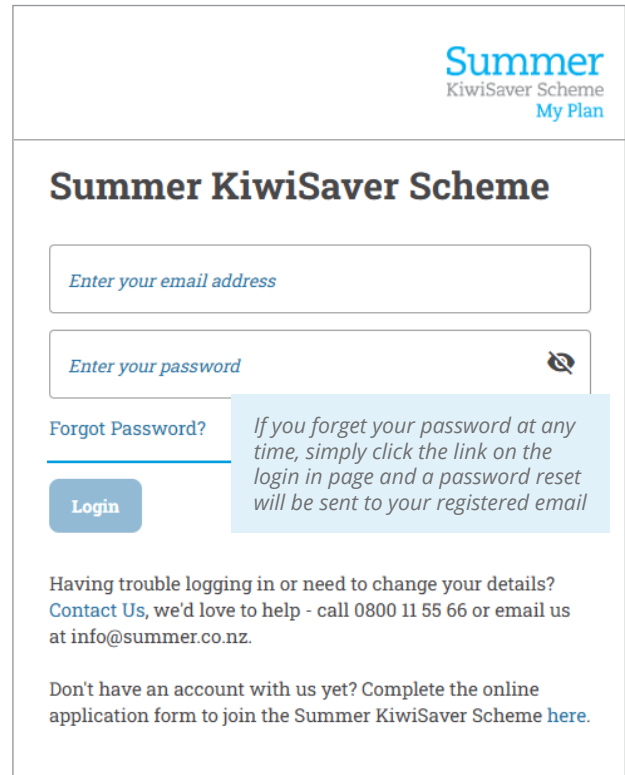
At least 8 characters

- One uppercase letter (A-Z)
- One lowercase letter (a-z)
- One number (0-9)
- One special character (!@#\$%^&*)

Step 2: Logging in to the Summer KiwiSaver Member Portal

Once you have set your password, you're all set to go and can access your portfolio at any time through the Summer KiwiSaver website using the *Log In* button in the top right: <https://www.summer.co.nz/>

This will direct you to the secure sign in page of the Member Portal below.



Alternatively, you can use the direct URL link to the sign in page: <https://secure.summer.co.nz/auth/signin>


Resetting your password

If you forget your password at any stage, simply click the *Forgot Password?* link on the login in page (shown above) and a password reset will be sent to your registered email.

Overview of the Summer KiwiSaver Member Portal

After logging into the Summer KiwiSaver Member Portal, you will be directed to your dashboard. This will give you an overview of your KiwiSaver account and how it's performed over time.

It also includes the **Deposits widget**, where you will see your new unique identifier (that replaces your FB number). Please update this information on the reference field for any existing scheduled payments.



[Investor profiles](#) | edengsmith@gmail.com ▼

[Click here to see /edit your member details](#)

Hello Example Member

You're currently viewing

All investors and portfolios ▼

[Dashboard](#)
[My plan](#)
[Performance](#)
[Documents](#)

7 May 2026

▼

Portfolio value

208,860.74 NZD

Example Member - KiwiSaver Portfolio - 555874

208,860.74 NZD
100.00 %

Make a one-off contribution

A voluntary contribution to your KiwiSaver cannot be reversed once you have made it. For more information click [here](#).

Deposit

Summary

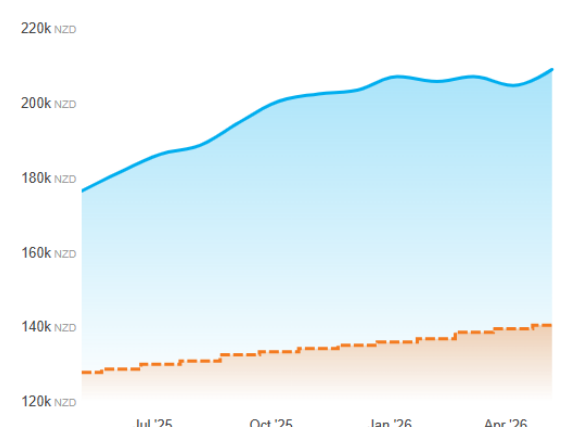
PORTFOLIO VALUE
 208,860.74 NZD
As at 07/05/2026

Your contributions	10,061.39 NZD
Employer's contributions	2,049.87 NZD
Government contributions	521.43 NZD
Other contributions	0.00 NZD
Gains / (losses) after fees	68,638.75 NZD
Withdrawals ?	0.00 NZD
Tax refund / (paid) ?	333.88 NZD

Portfolio value over time

68,639 NZD i

Movement since inception Last year ▼



Where your money is invested

Summer Growth Selection

208,860.74 NZD | 100.00%

Investment funds

[Click here](#) to be taken to our website to get more information on the funds you can invest in and for tips on how to invest, what to invest in and what you can expect.

2

From the dashboard page, you will also see some additional tabs on the horizontal menu under the blue banner to navigate to the following areas:

My Plan – To see your current regular investment plan (i.e. how your KiwiSaver contributions are allocated across your selected funds)

Performance – To see how your KiwiSaver investment has performed over time.

Documents – A document library where any new investment documents will be available to view (e.g. Annual Member Statements)

- For any historical documents prior to transition in January 2026, please contact the Summer KiwiSaver team for assistance.

Making a Contribution

If you want to make a voluntary contribution, you can access the bank details and your unique entity identifier in the deposit widget. Summer KiwiSaver Scheme is a registered bill payee so you can also search for the registered bill payee details in your banking application.

Make a one-off contribution ✕

Log in to your internet banking and make a one-off contribution into your KiwiSaver scheme.

Simply search for **Summer KiwiSaver Scheme** as the payee in the bill payment register and complete the details. You can then save this for future contributions.

You can also use the details below exactly as they're shown. Payment can also be made directly to Inland Revenue by selecting the Pay Tax option in internet banking (choose the KSS tax code).

As soon as your money is received by us, we will allocate it to your KiwiSaver portfolio.

Bank Account Number

02-0506-0080685-000

Copy

Enter the bank account number into the payee field or search for *Summer KiwiSaver Scheme* as a registered payee.

Particulars

Copy

Enter your surname (e.g. Smith).

Code

999-999-999

Copy

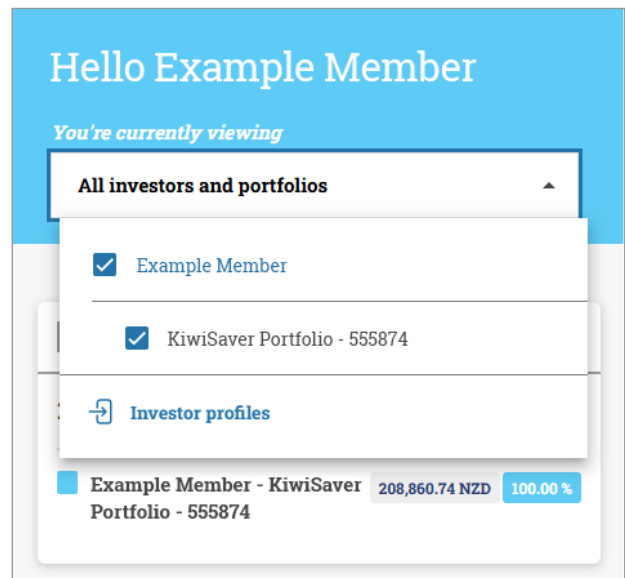
Enter your IRD number (e.g. 000-000-000).

Reference

How to switch between accounts

If your user account is linked to other investor profiles (e.g. your child's KiwiSaver account), then you will be able to switch your view to the various accounts by:

1. Clicking the 'Investor Profiles' tab at the top right of the screen, then selecting the required investor profile
2. From the 'You're currently viewing' dropdown box, select the investment profile you want to view
3. Click outside the dropdown box and the page will update

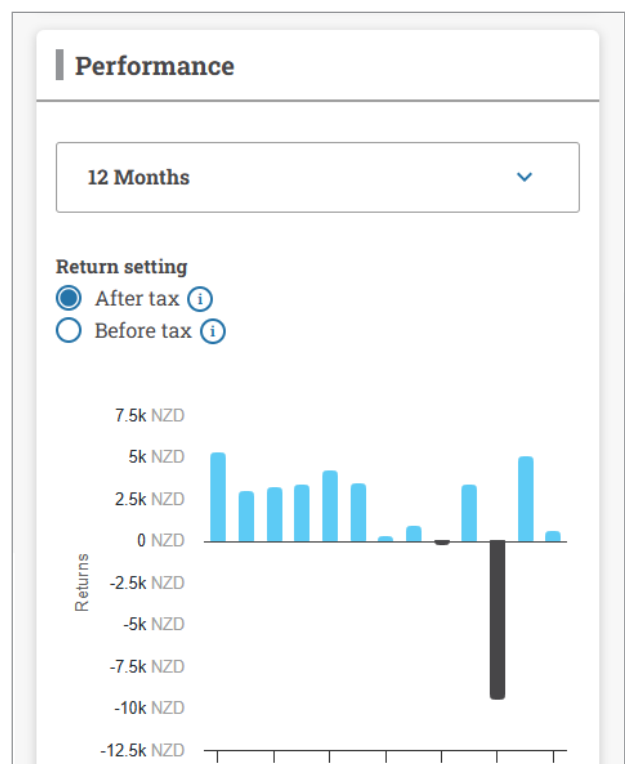


Viewing Portfolio Performance

In the investor portal, you can view your portfolio's performance in two areas:

1) Dashboard

Shows portfolio performance, with various options to filter by different time periods and options to show returns before or after tax.



2) Performance tab

This page will give you a more granular view of performance, including:

- Returns breakdown
- Performance by asset and/or asset classification

The data will refresh as you select your preferred options. The selected tables can be exported to Excel to allow further analysis as required – using the 'Export to Excel' icon on the bottom right corner of the applicable tables (example on right)

You're currently viewing

Hello Example Member

All investors and portfolios ▾

Dashboard My plan Performance Documents

Filter
1 year ending May 7, 2026
▾

Portfolio value

208,860.74 NZD

Overview 1 year ending May 7, 2026

Total investment ⓘ 12,632.69 NZD	Returns 10.86%	
	Month 1.64% 3 Years 8.70% p.a.	Quarter -0.19% 5 Years 5.15% p.a.
		12 Months 10.86% Since inception 5.28% p.a.

Returns breakdown 1 year ending May 7, 2026

Opening value	NZD 176,386.63
▸ Deposits and Transfers In	NZD 12,632.69
▸ Gains	NZD 19,543.54
▸ Tax	NZD 333.88
▸ Expenses	NZD -36.00
Closing value	NZD 208,860.74

[Export as Excel](#)

Returns 1 year ending May 7, 2026

Month	Return (%)
May 2025	3.0
Jun 2025	1.5
Jul 2025	1.5
Aug 2025	1.5
Sep 2025	2.0
Oct 2025	1.5
Nov 2025	0.0
Dec 2025	0.5
Jan 2026	0.0
Feb 2026	1.5
Mar 2026	-5.0
Apr 2026	2.5
May 2026	0.5

Performance by asset ⓘ

Depending on the date range selected, the results will be displayed as annualised or de-annualised ⓘ

Asset performance
Asset classification performance

Name	Asset allocation	Closing value	Closing portfolio weight	Performance	Contribution to return ⓘ
▸ Summer Growth Selection	■	NZD 208,860.74	100.00%	10.87% ↑	10.86%
▸ Cash & Cash Equivalents ⓘ	■	NZD 0.00	0.00%	N/A	N/A ⓘ

[Export as Excel](#)

View and Create reports

From the Documents tab, you will be able to:

1) Create and view standard reports for a given time period

- **General Ledger** – Transaction data is segregated, by type, into accounts for assets, liabilities, owners' equity, revenues, and expenses.
- **Investment Report** – PDF report showing a full comprehensive view of an investors' holdings within a portfolio and transactions/performance within a specified timeframe (predefined options and custom)

Optional sections include:

- Asset allocation (by sector, target v actual).
 - Valuations breakdown.
 - Statements Summary
 - Performance by Asset
 - Transactions (deposits/withdraw)
 - Incomes/expenses
- **Management Accounts** – More granular view showing the statement of financial position. Often useful for accountants.
This report is run at portfolio level and provides an export of portfolio value data, including balance sheet, valuation, income, forward contracts, fixed income and cash positions

The screenshot shows the 'Create Report' page for 'Hello Example Member'. At the top, there is a navigation bar with 'Create Report', 'View Reports', and 'Reports'. The main heading is 'Create Report'. Below this, there is a section titled 'SELECT REPORT TEMPLATE' with three radio button options: 'General Ledger Report' (selected), 'Investment Report', and 'Management Accounts'. Underneath, there is a 'Portfolio' dropdown menu showing 'Example Member - 555874'. Below that is a 'Select Date' dropdown menu with 'Select date' as the placeholder. At the bottom right, there is a blue 'Generate Report' button.

2) View Published Reports

This document repository will be where you can access and view any documents published by your Scheme Administrator. Examples may include Annual Member Statements, Tax statements, etc.

The screenshot shows the 'View Reports' page for 'Hello Example Member'. At the top, there is a navigation bar with 'Create Report', 'View Reports' (selected), and 'Reports'. The main heading is 'View Reports'. Below this, there is a table with columns: 'Entity', 'Report Name', 'Period', 'Date', and 'Action'. The table is currently empty, with a message below it stating 'There are no reports to display for your investments and portfolio'.

The screenshot shows the 'Reports' page for 'Hello Example Member'. At the top, there is a navigation bar with 'Create Report', 'View Reports', and 'Reports' (selected). The main heading is 'Reports'. Below this, there is a text block stating 'This section contains uploaded reports that are relevant to your investments and portfolio.' Underneath, there is a 'VIEW BY' section with a radio button option 'All documents' (selected).

Changing your investment profile (Switching between funds)

The Owner or Authorised Representative of an investment entity has the permissions to update their investment profile.

To do this, you can go into the 'My Plan' page, then edit your selection as shown on the right.

Hello Example Member

You're currently viewing **All investors and portfolios**

Dashboard **My plan** Performance Documents

My plan Pending orders

My Plan

Your KiwiSaver contributions are currently allocated to the funds below. To change how you would like your contributions allocated click the edit button below and follow the prompts.

Investment Manager	Fund	Fees (% p.a.)	Sector	Percentage
Forsyth Barr Investment Management Limited	Summer Growth Selection	0.90%	Diversified	100.00%

[Edit](#)

1. **Choose the funds** - Use the 'View by' radial buttons to see the details of all / selected/ not selected funds that you can choose from.

Edit My Plan

In **three simple steps** you can change how your KiwiSaver contributions will be invested. You can apply this change to your current portfolio and future contributions or to just your future contributions.

1 CHOOSE FUNDS 2 ADD AMOUNTS 3 UPDATE

Choose funds

Select the funds that you want to include in your KiwiSaver Plan. For more information [click here](#).

View By

- All funds
- Funds included in your plan
- Funds not included in your plan
- [Clear filter](#)

<input type="checkbox"/>	Fund	Sector	Fees (% p.a.)
<input checked="" type="checkbox"/>	Summer Growth Selection Forsyth Barr Investment Management Limited You hold 134,059.1491 units, worth 208,860.74 NZD	Diversified	0.90%
<input type="checkbox"/>	Summer Balanced Selection Forsyth Barr Investment Management Limited	Diversified	0.90%
<input type="checkbox"/>	Summer Australian Equities Forsyth Barr Investment Management Limited	Australasian Equities	0.90%

2. **Add the desired allocation for each fund**, then click 'next'

✓ — 2 — 3
 CHOOSE FUNDS ADD AMOUNTS UPDATE

Add amounts

Select the percentage weighting of your contributions that you want allocated across each fund. The total must add up to 100%.


Investment Manager	Fund	Fees (% p.a.)	Sector	Percentage
Forsyth Barr Investment Management Limited	Summer Balanced Selection View Product Disclosure	0.90 %	Diversified	<input type="text" value="50"/>
Forsyth Barr Investment Management Limited	Summer Growth Selection View Product Disclosure	0.90 %	Diversified	<input type="text" value="50"/>
TOTAL				100.00%

3. **Apply changes to all future contributions.** For Summer KiwiSaver, this change will apply to all future contributions. Select the blue 'Apply to future only' button to progress to the declaration

✓ — ✓ — 3
 CHOOSE FUNDS ADD AMOUNTS UPDATE


Apply your changes

Select how you would like to apply this change to your Summer KiwiSaver Scheme portfolio. You can choose to apply to your current investment mix and future contributions which will rebalance your portfolio or alternatively apply the change to future contributions only.



Future contributions

Apply change to how your contributions are going to be invested going forward.



Rebalance Funds

Rebalance your portfolio to be in line with your new weightings and also apply to future contributions.

4. Read and acknowledge the declaration then confirm your changes.

Apply your changes

Select how you would like your contributions to be allocated to your current investment mix and future contributions only.

By clicking 'Confirm' your changes will be applied to the way your contributions are allocated going forward.

There are no charges for making changes to your account including switching between funds. For more information [click here](#).

Forsyth Barr Investment Management Limited - Summer Growth Selection @ 50.00%

Forsyth Barr Investment Management Limited - Summer Balanced Selection @ 50.00%

[Download](#) and read the Product Disclosure Statement (PDS).

I have read, understood and accept the latest Product Disclosure Statement(s) relevant to my chosen funds and understand that additional information about the Summer KiwiSaver Scheme is available at www.summer.co.nz and on the [Disclose Register](#).

[Cancel](#) [Confirm](#)

Apply change to how your contributions are going to be invested going forward. Rebalance your portfolio to be in line with your new weightings and also apply to future contributions.

5. Your changes will be saved and your new investment profile will be visible under 'My Plan'

My Plan

Your KiwiSaver contributions are currently allocated to the funds below. To change how you would like your contributions allocated click the edit button below and follow the prompts.

Investment Manager	Fund	Fees (% p.a.)	Sector	Percentage
Forsyth Barr Investment Management Limited	Summer Growth Selection	0.90%	Diversified	50.00%
Forsyth Barr Investment Management Limited	Summer Balanced Selection	0.90%	Diversified	50.00%

[Edit](#)

Any questions or need help?

For any other assistance, please reach out to the Summer KiwiSaver team on info@summer.co.nz or call us on 0800 11 55 66