NZ Funds KiwiSaver Scheme

Notice to Change Prescribed Investor Rate (PIR)

Use this form to update your Prescribed Investor Rate (PIR) or tax residency details.

Return to NZ Funds KiwiSaver Scheme, Private Bag 92050, Victoria Street West, Auckland 1142, or by email to nzfkiwi@linkmarketservices.com.

1. Your personal details

Member number

N	Z	F							

IRD number

Name

Title	First name	Middle name(s)	Surname

Are you a New Zealand tax resident?

☐ Yes ☐ No If No, please state country(s) of residence.

2. Prescribed Investor Rate (PIR)

- The rate you elect below will apply to your NZ Funds KiwiSaver Scheme Account.
- If New Zealand Funds Management Limited (NZ Funds) does not have a record of your elected PIR, your PIR will default to 28%.
- Non-residents must elect a PIR of 28%.
- For assistance in selecting your PIR we recommend you consult your financial adviser or tax adviser (if applicable) or refer to the table 'How to calculate your PIR' on the following page.

PIR (select one)

☐ 10.5% ☐ 17.5% ☐ 28%

3. Signature(s)

I/we confirm that the information provided in this form is true and correct and agree to the terms on the following page.
I/we acknowledge the PIR elected will continue to apply until I/we advise New Zealand Funds Management Limited otherwise.

Signature

Signature (if applicant is 16 years or older)	Day	Month	Year

Parent/guardian signature*	Day	Month	Year

Parent/guardian signature*	Day	Month	Year

* If the member is under the age of 16, both parents/all legal guardians must sign this form.
If the applicant is 16 or 17, one parent/legal guardian must sign this form.

This form cannot be processed unless fully completed and signed. Please see the terms on the following page.

4. Terms

Change in tax residence: If you change your tax residence at any time in the tax year, you must immediately notify New Zealand Funds Management Limited (NZ Funds) of your change in tax status and complete the appropriate changes in client details form to update your residency details.

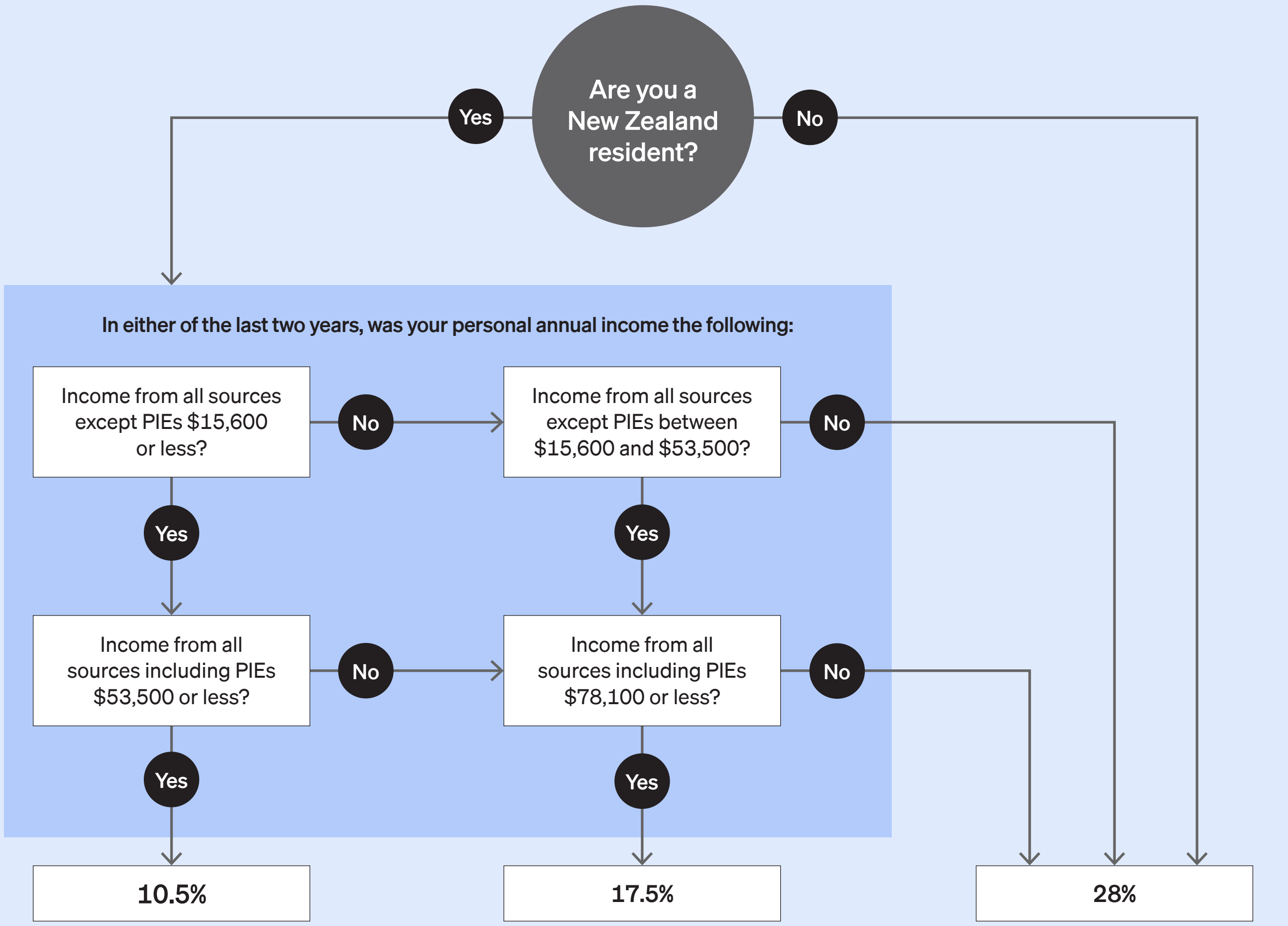
Change of Prescribed Investor Rate (PIR): You may change your PIE tax details or PIR at any time by completing this form and providing it to NZ Funds.

Use of information: I/we authorise NZ Funds to use the information provided in this form and any other information which NZ Funds holds about me/us for the purpose of meeting all the Scheme's PIE tax obligations with the Inland Revenue Department (IRD).

NZ Funds is entitled to rely on the information provided in this form unless changed by me/us in accordance with these Terms. I/we agree that neither NZ Funds nor any of its related parties will be liable for any loss, damage or claim, whether for negligence or otherwise, arising from or in any way connected with the performance or non-performance of its duties under these Terms, except as may be required by law.

No release: Nothing in these Terms relieves you of your responsibilities to the IRD under the applicable tax legislation.

5. How to calculate your PIR



Further notes:

If your correct PIR is lower than your elected PIR, you may be able to obtain a refund of excess tax paid.

If your correct PIR is higher than your elected PIR, you are responsible for paying the tax shortfall including penalties (if any).

Please see your Financial Adviser if you are unsure which rate you should use.