

SBS Wealth KiwiSaver Scheme Change of Personal Details Form



You can change your contact details and Prescribed Investor Rate (PIR) online instead. Login to your SBS Wealth KiwiSaver Scheme account at www.sbswealth.co.nz/member-login. You can also change your contribution rate online by logging into MyIR at www.ird.govt.nz or by contacting your employer directly.

Use this form to **update the personal details we hold for your SBS Wealth KiwiSaver Scheme account.**

If you require assistance completing this form then please contact us **0800 727 935** or email us at contact@sbswealth.co.nz.

Return form

Please return the completed form and any requested supporting documents to us by post or email:

Post: SBS Wealth KiwiSaver Scheme, PO Box 10445, Wellington 6143 | Email: contact@sbswealth.co.nz

Section 1: Member's details (please provide the details we currently have recorded for you)

Member **K S** DoB **DD MM YYYY** IRD number

Title Given name(s) Surname

Please only complete those sections below that you are updating before reading Sections 7 & 8 and signing Section 9: Member declaration .

Section 2: Change your name (please attach copies of supporting documentation of this change)

Title Given name(s) Surname

Reason for change

I have attached one of the following supporting documents: (please tick one)

☐ Marriage certificate ☐ Name change certificate ☐ Birth certificate ☐ Other (state)

Note: The document must be verified in person at your local SBS Bank, or approved distribution partner. Otherwise they must be certified by a Trusted Referee (i.e. Lawyer, Chartered Accountant, Justice of Peace or person who has the legal authority to take statutory declarations or the equivalent in New Zealand).

Please provide your old signature

Section 3: Change your contact details

New postal address

Postcode

New physical address ☐ (Tick here if same as postal)

Postcode

New mobile New home phone

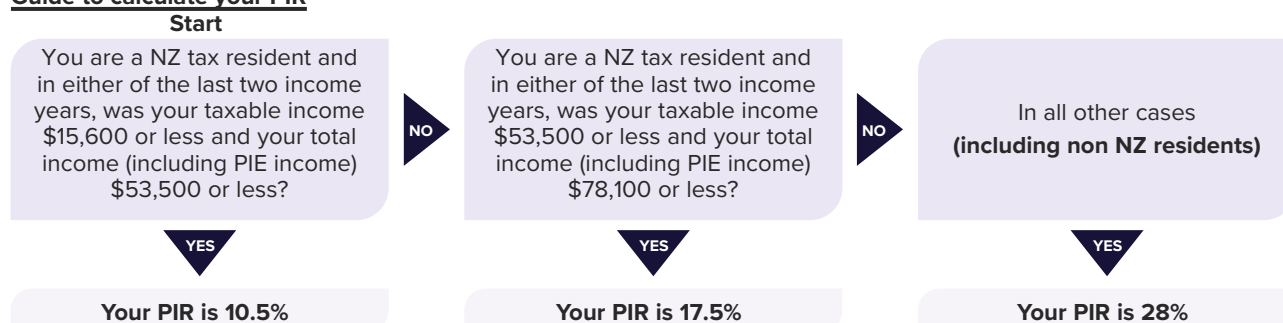
New email address*

* Supply email address if you wish to receive all communications regarding the SBS Wealth KiwiSaver Scheme via email.

Section 4: Change your Prescribed Investor Rate (PIR)

If you are unsure of your PIR, we recommend you seek professional advice or contact the Inland Revenue Department. It is your responsibility to tell us your PIR when you invest or if your PIR changes. If you do not tell us, a default rate may be applied. If the rate applied to your PIE income is lower than your correct PIR you will be required to pay any tax shortfall as part of the income tax year-end process. If the rate applied to your PIE income is higher than your PIR any tax over-withheld will be used to reduce any income tax liability you may have for the tax year and any remaining amount will be refunded to you.

Guide to calculate your PIR



Prescribed Investor Rate ("PIR") (please tick one) ☐ 10.5% ☐ 17.5% ☐ 28%

Refer to Inland Revenue www.ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate for more information.

Section 5: Change your contribution rate

Note: You can also change your contribution rate online by logging into MyIR at www.ird.govt.nz. You can also contact your employer directly and ask them to change it for you.

This percentage is the amount of your pay that is deducted and invested into your KiwiSaver Scheme. The default rate is 3% and your employer must match at least this amount. Increasing your contribution rate above 3% doesn't mean your employer will match the higher contribution rate.

You can change your contribution rate once every 3 months, unless your employer agrees to a shorter timeframe.

You can choose to contribute 3%, 4%, 6%, 8% or 10% of your pay. If you want to contribute more than the maximum rate, you

can make a lump sum payment directly to us. Details on how to do this can be found at www.sbswealth.co.nz in the "lump sum additional details form".

Contribution Rate (please tick one): ☐ 3% ☐ 4% ☐ 6% ☐ 8% ☐ 10%

Section 6: Change your bank account details (this bank account will be used for regular withdrawals and must be in your name or jointly in your name)

Note: If you wish to change the bank account for your direct debits, please complete the 'Authority to Accept Direct Debits' form instead.

Please pay (please tick one) ☐ To a New Zealand bank account ☐ To an overseas bank account by Telegraphic Transfer

Bank account name

Account number - - -
Bank Branch Account number Suffix

Bank Name Branch City

☐ **Please provide evidence of your bank account details** (please tick)
(attach a pre-printed deposit slip, copy of bank statement, over-the-counter printed receipt with a teller's stamp or on-line bank statement containing the name of the bank in the header or footer)

Overseas bank details (in addition to the above details please complete the following swift and/or IBAN details if the payment is to an overseas account)

Swift number IBAN number

Section 7: Privacy policy

For the latest version of our Privacy Policy please see www.sbswealth.co.nz/privacy-policy/.

I confirm that I have read and understood the Privacy Policy and consent to the collection, use, disclosure and retention of my personal information for the purposes of processing this application, managing my membership of the Scheme and as otherwise in accordance with the terms of the Privacy Policy.

Section 8: Identification details

Before processing your request we may require you to provide verified or certified copies of your identity documents. If we do require these we will contact you using the details provided above. Alternatively, you can contact us to see if your identity documents are required before sending us this form – email us at contact@sbswealth.co.nz.

Section 9: Member declaration

If you do not provide all of the required information, we may be unable to process this form.

If this request is for a minor please refer to the “Guide to Proof of Guardianship” form available at www.sbswealth.co.nz to determine who may sign this form and the requested documents to evidence this.

1. I declare that the details I have supplied in this form are correct and I request that my account record is updated to reflect the changes specified in this form.
2. I have read the privacy statement in this form.

Members aged 18+

Member's signature Date

Members aged 16 or 17

Member's signature Date

Guardian's signature Date

Members aged 15 or below

Guardian's signature Date

Guardian's signature Date