

PIR UPDATE FORM

INDIVIDUALS



Note that you can update your tax information, including your prescribed investor rate (PIR), through ANZ Internet Banking.

The fastest way to provide us your form and supporting documents is to email them to registry@anzinvestments.co.nz. Alternatively you can post them to ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland 1142 or drop them into an ANZ branch.

1. INVESTOR INFORMATION

Investor name

Contact number Email

ANZ customer (or investor) number

Are you a New Zealand resident for tax purposes?

☐ Yes (select your PIR in section 2 below) ☐ No (your PIR will be 28%)

Specify your country of tax residence

For help, see your tax adviser or call Inland Revenue on 0800 227 774 or +64 4 978 0779.

2. TAX INFORMATION

(visit anz.co.nz/pirupdate or call 0800 736 034 or +64 9 356 4000 for help)

IRD number PIR ☐ 10.5% ☐ 17.5% ☐ 28%

If you're investing jointly with another person, we will apply the highest PIR of the joint investors to calculate the tax.

3. PRIVACY

You agree we can collect, use and disclose your information to process your application in accordance with our Privacy Statement, which is the same as ANZ Bank New Zealand Limited's and can be found at anz.co.nz/privacy. If you prefer a print version, it is available to download as a PDF or from any branch.

We take your privacy seriously, and understand the need to keep your information confidential and secure. You can access or correct your personal information by calling 0800 736 034 or asking at any ANZ branch. We may charge you a fee to access the information we have about you.

4. AGREEMENT

I confirm that:

- the information provided is correct.
- if applicable I have personally affixed my digital signature to this document.

Signature

Date

If signed under power of attorney, the attorney hereby certifies that he/she has not received notice of revocation of that power.

If signed on behalf of a minor the signatory hereby certifies that he/she is an authorised signatory.

5. HOW LONG WILL IT TAKE

Once we've received your form, we aim to action your request and show it in ANZ goMoney and ANZ Internet Banking within 5 business days. It may take longer if there are public holidays, or we need to ask you for additional information.

INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

Branch Stamp

Once completed – staff must scan this form and all required supporting documents in the checklist to registry@anzinvestments.co.nz