

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

ANZ customer (or investor) number

2. 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.

3. 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.

4. NON-NEW ZEALAND TAX RESIDENT COMPANIES, CHARITIES, PARTNERSHIPS, MANAGED INVESTMENT SCHEMES OR TRUSTEE OF A TRUST ONLY

Country of tax residence

I confirm that, as a non-New Zealand resident for tax purposes, my PIR is 28%.

I confirm that the information I have provided is correct and that I am authorised to sign on behalf of the company, charity, partnership, managed investment scheme or trust.

Name of authorised signatory

Signature

Date

5. NEW ZEALAND TAX RESIDENT COMPANIES, CHARITIES OR MANAGED INVESTMENT SCHEMES ONLY

IRD number

The PIR for New Zealand tax resident companies (including managed investment scheme and charities) is 0%. You are required to supply us with your IRD number.

I confirm that:

- the information I have provided is correct and that I am authorised to sign on behalf of the company or charity
- if applicable, I have personally affixed my digital signature to this document.

Name of authorised signatory

Signature

Date

PIR UPDATE FORM

6. NEW ZEALAND TAX RESIDENT TRUSTEE OF A TRUST (EXCLUDING MANAGED INVESTMENT SCHEME AND CHARITIES) ONLY

IRD number

You are required to supply us with your IRD number.

The trust's current PIR is ☐ 0% ☐ 10.5% ☐ 17.5% ☐ 28%

Note: Only New Zealand resident trustees of testamentary trusts can choose 10.5%.

Declaration

I/we confirm that:

- the information provided is correct and that I/we are authorised to sign on behalf of the trust.
- if applicable I/we have personally affixed my/our digital signature(s) to this document.

Trustee's signature

Date

Trustee's signature

Date

Trustee's signature

Date

7. IF INVESTING THROUGH A NEW ZEALAND TAX RESIDENT PARTNERSHIP ONLY

IRD number of partnership

You are required to supply us with your IRD number.

The partnership's current PIR is ☐ 0% ☐ 10.5% ☐ 17.5% ☐ 28%

Note: Where all the partners are New Zealand tax resident individuals, the PIR must be the highest PIR of all the partners and cannot be zero.

Where one or more of the partners are non-New Zealand tax resident, we recommend you seek independent advice regarding the appropriate PIR for this investment.

Declaration

I confirm that:

- the information I have provided is correct and that I am authorised to sign on behalf of the all partners
- if applicable, I have personally affixed my digital signature to this document.

Name of partner/authorised signatory

Signature

Date

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