

Scan and email your completed form to [registry@anzinvestments.co.nz](mailto:registry@anzinvestments.co.nz). Alternatively you can bring it to any **ANZ branch**, or post it to **ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141**.

**1. INVESTOR INFORMATION**

ANZ customer (or investor) number

Investor name

**2. COMPLETE THIS SECTION IF YOU ARE A NON-NEW ZEALAND TAX RESIDENT COMPANY, CHARITY, PARTNERSHIP, MANAGED INVESTMENT SCHEME OR TRUSTEE OF A TRUST**

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

**3. COMPLETE THIS SECTION IF YOU ARE A NEW ZEALAND TAX RESIDENT COMPANY, CHARITY OR MANAGED INVESTMENT SCHEME**

IRD number    (if your IRD number has 8 digits, record a zero in the first box)

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.

Name of authorised signatory

Signature

Date

If you have any questions regarding your PIR, please contact your financial adviser or contact our Customer Services team:

 0800 736 034 (+64 9 356 4000 if overseas)  [service@anzinvestments.co.nz](mailto:service@anzinvestments.co.nz)  PO Box 7149, Wellesley Street, Auckland 1141

# PIR RESPONSE FORM

## 4. COMPLETE THIS SECTION IF YOU ARE A NEW ZEALAND TAX RESIDENT TRUSTEE OF A TRUST (EXCLUDING MANAGED INVESTMENT SCHEME AND CHARITIES)

IRD number    (if your IRD number has 8 digits, record a zero in the first box)

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.

Trustee's signature

Date

Trustee's signature

Date

Trustee's signature

Date

## 5. COMPLETE THIS SECTION IF YOU INVEST THROUGH A NEW ZEALAND TAX RESIDENT PARTNERSHIP

IRD number of partnership    (if your IRD number has 8 digits, record a zero in the first box)

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 provided is correct and I am authorised to sign on behalf of all partners.

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 [service@anzinvestments.co.nz](mailto:service@anzinvestments.co.nz)