



Client Change of Details Form



We are constantly updating our client records in order to provide you with the best possible service.

Current Account Details

Account Number:

Account Name: _____

Account Number:

Account Name: _____

Please fill in the following section/s which require updating.

Change of Address Details

New Residential Address

Name: _____

Status: _____

Residential Address: _____

Street No./Name: _____

Suburb/RD No.: _____

Town/City: _____ Postcode: _____

Country: **New Zealand** **Other (please state):** _____

New Mailing Address *Tick here if same as Residential Address above*

Name: _____

Status: _____

Mailing Address: _____

Street No./Name/PO Box: _____

Suburb/RD No.: _____ Mail Centre: _____

Town/City: _____ Postcode: _____

Country: **New Zealand** **Other (please state):** _____

Status: e.g. Account Holder, Authorised Person, Director, Partner, Trustee.

Country: If you are changing your country of residence, please ensure you complete the *Change of Tax Details* section on page 2.

Status: e.g. Account Name, Account Holder, Authorised Person, Director, Partner, Trustee.

Country: If you are changing your country of residence, please ensure you complete the *Change of Tax Details* section on page 2.

Name Change: Please refer to the verification requirements on page 3.

Status: e.g. the Account Name, Account Holder, Authorised Person, Director, Partner, Trustee.

Status: e.g. Account Holder, Authorised Person, Director, Partner, Trustee.

RWT Rate: If a valid IRD number is not provided in Section A, the default withholding tax rate of 33% will be applied.

Exempt: Please attach Exemption Certificate to this Schedule.

Prescribed Investor Rate: A PIR is the tax rate that the PIE you invest in can use to calculate the tax on the income it derives from investing your contributions, if you have also provided your IRD number. If a PIR is not selected the default PIR of 28% will be applied.

Non-Resident Withholding Tax Rate: The appropriate Non-Resident Withholding Tax Rate will be applied based on your country of residence.

Change of Name

From:

To:

Status:

Change of Contact Details

Name:

Status:

Phone Work:

Phone Home:

Phone Mobile:

Fax:

Email:

Change of IRD Number

Name:

IRD Number:

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Name:

IRD Number:

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Change of Tax Details

New Zealand Tax Residents

Resident Withholding Tax Rate (RWT):	Exempt	10.5%	17.5%	30%	33%
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Prescribed Investor Rate (PIR)

Primary Applicant:	10.5%	17.5%	28%
Second Joint Applicant:	10.5%	17.5%	28%

For further information on selecting the appropriate RWT or PIR, please refer to www.ird.govt.nz. Please advise Forsyth Barr should your tax details change.

Overseas Tax Residents

Country of Residence:

Please apply the Approved Issuer Levy (2%), where applicable, to approved interest-bearing investments

The default Prescribed Investor Rate (PIR) for non-residents is 28%.

Please advise Forsyth Barr should your tax details change.

Verification

Change of Name

We are required by law to verify your identity. These procedures are in place to protect you and to ensure that transactions are being effected for the right person.

Accordingly, please provide the following identification to confirm the name change:

1. Natural Persons

An original certified copy of a Marriage Certificate or Deed Poll or other relevant documentation which links the old name with the new name

2. Company/Incorporated Society/Incorporated Charitable Trust/Authorised Company account

Certificate of Incorporation which confirms the new name of the entity (original certified copy if incorporated outside NZ)

3. Partnership/Unincorporated Association account

An original certified copy of the relevant pages of the Partnership Deed/Agreement which confirms the new name of the entity

4. Trust account

An original certified copy of the relevant pages of the Trust Deed which confirms the new name of the Trust

Documents provided must be certified

The copies provided must be certified by a trusted referee. Alternatively, you can provide original documents to a Forsyth Barr Authorised Financial Adviser for verification.

A trusted referee must be at least 16 years old and must not be your spouse or partner, related to you, someone who lives at the same address as you, or someone involved in the transaction or business requiring the certification.

A trusted referee must be one of the following:

- Commonwealth representative
- Member of the New Zealand Police
- Justice of the Peace
- Registered Medical Doctor
- Registered Teacher
- Minister of Religion
- New Zealand Lawyer
- Notary Public
- New Zealand Honorary Consul
- Member of Parliament
- Chartered accountant
- Kaumatua

The trusted referee must sight the original document, and provide a written statement to the effect that the copy provided is a true and correct copy and represents your identity. Certification must include the name, occupation, and signature of the trusted referee and the date of confirmation, and must have been carried out in the last three months.

Signatures

I/We authorise Forsyth Barr Limited to make the changes in accordance with my/our instructions on this form.

I/We authorise Forsyth Barr Investment Management Limited to make change(s) in accordance with my/our instruction(s) on this form on my Summer KiwiSaver account where applicable.

Please tick this box if you do not wish us to apply the change(s) to your Summer KiwiSaver account.

Where I am signing on behalf of other account holders, I confirm that the other account holders consent and duly authorise me to complete and submit this form on their behalf.

Name: _____

Signature: _____

Date:

DAY		MONTH		YEAR			

Name: _____

Signature: _____

Date:

DAY		MONTH		YEAR			

Name: _____

Signature: _____

Date:

DAY		MONTH		YEAR			

Name: _____

Signature: _____

Date:

DAY		MONTH		YEAR			

For Office Use Only

Please confirm if the client has the following accounts with Forsyth Barr:

- Summer KiwiSaver scheme Forsyth Barr Investment Funds