

Forsyth Barr Cash Management Prescribed Investor Rate (PIR) Election Form



Please complete the details below to advise us of your PIR.

All Investors (Excluding Joint)

Name: _____

Account Number:

IRD Number:

Elected PIR: 0% 10.5% 17.5% 28%
(tick one box only)

Signature: _____

Date:

DAY MONTH YEAR

Please indicate the capacity in which
you are signing (e.g. Self, Director, Trustee):

Signature: _____

Date:

DAY MONTH YEAR

Please indicate the capacity in which
you are signing (e.g. Self, Director, Trustee):

Signature: _____

Date:

DAY MONTH YEAR

Please indicate the capacity in which
you are signing (e.g. Self, Director, Trustee):

All parties to the account must sign above before we can accept this notification.

Please remember to advise us if your Prescribed Investor Rate (i.e. 0%, 10.5%, 17.5% or 28%) needs to be altered during the year. This form is for the purposes of ascertaining your PIR only and is not to be used for any other purpose, including instructing us regarding your investments.

Name Details: Please record full legal name

Tax Rates: You can only choose a PIR of 0% if you are New Zealand resident for tax purposes and are a complying trust, company, registered charity, PIE Investor Proxy, or superannuation fund. You can only choose a PIR of 10.5% if you are a New Zealand resident individual or the trustee of a testamentary trust. If a trust chooses a PIR of 0%, 10.5% or 17.5% the income allocated is not excluded income in the hands of the trust and will not be a final tax.

We recommend you review your investments and seek specialist tax advice to determine which PIR is the correct rate for you.

Please
Turn Over

Joint Investors Only

Account Number:

Account Name:
.....

Name:
.....

IRD Number:

Please tax my investment at: 10.5% 17.5% 28%
(tick one box only)

Interest % in Joint Account: 50%

Signature:
.....

Date:

<input type="text"/>					
DAY	MONTH	YEAR			

Name:
.....

IRD Number:

Please tax my investment at: 10.5% 17.5% 28%
(tick one box only)

Interest % in Joint Account: 50%

Signature:
.....

Date:

<input type="text"/>					
DAY	MONTH	YEAR			

Name Details: Please record full legal name

Name Details: Please record full legal name

Interest % in joint account: We can allocate income equally to each Joint Applicant if they share their legal interest 50/50. If you would like this option, complete all the information in this section, including ticking the box at 'Interest % in Joint Account'. If the information is incomplete, or if Joint Applicants do not hold their legal interest 50/50, then income will be allocated subject to the highest PIR (if they are different) or to the first named (if they are the same). All parties to the account must sign above before we can accept this notification.

Please remember to advise us if your Prescribed Investor Rate (i.e. 10.5% 17.5% or 28%) needs to be altered during the year.

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Thank you for actioning this. Please return to **Forsyth Barr Limited, Private Bag 1999, Dunedin 9054.**