

Use this form to notify us of a change in your tax residency status for New Zealand tax purposes. If you need help completing this form, call us on **0800 697 728** (choose option 2).

Step 1: Complete your personal details

Title _____ Surname _____ First names _____
 Date of birth D D M M Y Y Y Y Employee number _____
 Street address _____ IRD number _____
 Postal address (if different from above) _____
 Work phone _____ Home phone _____ Best time to call _____
 Email _____

Step 2: Country/jurisdiction of residence for tax purposes

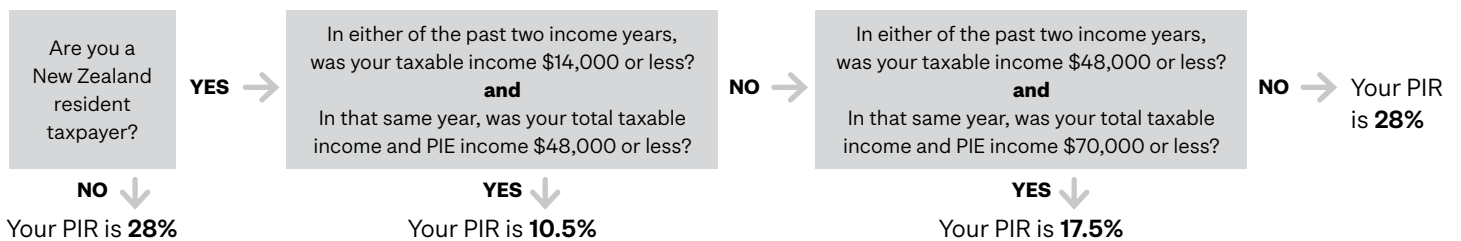
If you are not sure of your residency status please visit www.ird.govt.nz/international-tax/individuals/tax-residency-status-for-individuals or consult with a tax specialist.

Country/jurisdiction of tax residence

1. _____ 2. _____
 3. _____ 4. _____
 5. _____ 6. _____

Step 3: Select your tax rate (PIR) Mark the appropriate box with an X as shown here

Use the chart below to work out your prescribed investor rate (PIR) or use Inland Revenue's online tool at www.ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate. 10.5% 17.5% 28%



Taxable income is all of your income that is subject to income tax, including all salary and wages, less any claimable expenses and losses. **PIE income** means your share of a PIE's taxable income. PIE is short for portfolio investment entity. Many superannuation schemes and managed funds have chosen to become PIEs in order to pass on tax advantages for investors on lower incomes. Call us on **0800 697 728** (choose option 2) if you are not certain whether something is PIE income.

It is your responsibility to tell us your PIR when you invest or if your PIR changes. If you do not tell us, a default rate may be applied. If the advised PIR is lower than the correct PIR, you will need to complete a personal tax return and pay any tax shortfall, interest and penalties. If the default rate or the advised PIR is higher than the correct PIR, any additional tax paid by the scheme on your behalf may reduce your income tax liability for that income year and may give rise to a tax refund.

Step 4: Sign and date the form

I certify the information I have given is correct and acknowledge that I will be personally liable for any tax required to be paid if the information I have given is incorrect. **Please check you have marked one of the boxes in Step 3.**

Your signature _____ Date D D M M Y Y Y Y

Please return this form to FreePost 165572
 NZ Post Superannuation Plan
 Private Bag 39990
 Wellington Mail Centre
 Lower Hutt 5045

Office use only

Date received D D M M Y Y Y Y

Alternatively, you can scan and email the form to nzpostsuper@mercer.com