

Whakamahia tēnei puka hei huri i tō pāpātanga tāke.

Faaaoḡā le pepa faatumu lenei e sui ai lau fua faatatau o lafoga.

The NZ Post Superannuation Plan pays tax on your behalf at a rate based on your total personal income. This rate is called your prescribed investor rate (PIR). 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. Use this form to let us know or change your tax rate (PIR). For further information on your PIR, see the information on Inland Revenue's website at www.ird.govt.nz/roles/portfolio-investment-entities/using-prescribed-investor-rates.

Step 1: Complete your personal details

Title _____ Surname _____ First names _____

Date of birth DDMMYYYY Employee number _____

Street address _____

Postal address (if different from above) _____

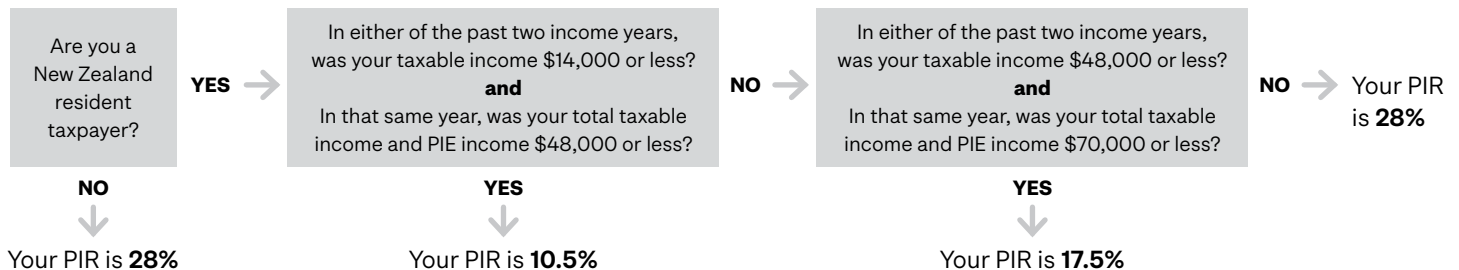
Work phone _____ Home phone _____ Best time to call _____

Email _____

Step 2: Select your tax rate (PIR) Mark the appropriate box with an X as shown here (X)

Use the chart below to work out your 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.

Step 3: 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 2.**

Your signature _____ Date DDMMYYYY

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

Alternatively, you can fax this form to (04) 819 2699 or scan it and email it to nzpostsuper@mercer.com

Office use only

Date received DDMMYYYY