lifestages

Change of Investor Details

(Fax to 0800 734 329 and post original to Lifestages, C/- Trustees Executors, PO Box 409, Wellington 6140)

Please complete this form to change the investor details on file.

Please note: Name changes must be supported by the appropriate documents (eg. marriage certificate).
All changes should be indicated on this form. For a change of ownership, please complete the 'Changes of Ownership' form.

Updated investor details (please print in block letters)

Portfolio number | | | | | | | | | | | Portfolio name

Title | Given name(s) | Family name

New title | New given name(s) | New family name

Full company, trust or organisation name

Company contact name

Title | Given name(s) | Family name

Existing IRD number | | | | | | | | | |

New physical address

| Postcode | Country

New postal address (if different from street address)

| Postcode | Country

New home telephone number | New business telephone number

New mobile number | New email address

Change in tax or resident status (please tick appropriate box)

Change to IRD number | | | | | | | | | |

Change in tax status. I/We have changed tax residency and now I/we reside in for tax purposes

Prescribed Investor Rate (PIR)

Your prescribed investor rate is the rate at which tax will be deducted from your investment in the Lifestages KiwiSaver Scheme ("the Scheme"). Refer to page 19 of the Lifestages KiwiSaver Scheme Investment Statement for guidance about selecting your prescribed investor rate.

It is very important that you tell us your correct Prescribed Investor Rate and tell us if your correct rate changes. If you do not advise us of a change in your Prescribed Investor Rate or provide us with the wrong rate you may have an obligation to file a tax return and pay further tax, and potentially penalties and interest.

Insert your Prescribed Investor Rate here %

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Change of Investor Details continued

Change in nominated bank account (for all account withdrawals)

New bank name | New branch name | New city

New account name

New account number

Bank | Branch | Account number | Suffix

New regular account withdrawals (Lifestages Corporate Bond Portfolio only)

Regular withdrawal amount $ | | | | | | | | | . | | |

Declaration and signature (Joint applications must be signed by all parties)

> I/We declare that the details I/we have supplied in this document are correct.

Investor's signature (1) | Date

Investor's signature (2) | Date

Investor's signature (3) | Date