



Changes in client details - Entity

Complete only the relevant sections and return to New Zealand Funds Management Limited, Private Bag 92226, Auckland 1142
The changes notified here will be implemented to all investments held by the named account.

1 | Client details

Member number

N	Z	F								
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Account name

Title	First name	Middle name(s)	Surname

2 | Change in contact details

New phone number(s)

Mobile	Home	Business

New address

Street / PO box

Suburb	Town / city	Postcode

Old address

Street / PO box

Suburb	Town / city	Postcode

New email address

If you supply an email address, we will send you information pertaining to your investment with us by electronic means.
We suggest using your personal rather than work email address as this is less likely to change over time.

Continued over...

3 | Change in tax residency details

Is the Entity a New Zealand tax resident

Yes No

IRD number

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Is the Entity a tax resident of any other country?

Yes No If Yes, please provide the country and Tax Identification Number (TIN)*:

Countries of tax residence

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Tax Identification Number (TIN)*

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Reason

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* If a TIN is unavailable, please provide the appropriate reason A, B or C.

A – Country does not issue TINs.

B – I have not been issued with a TIN.

C – Country does not require TIN collection.

Is the Entity controlled by a US person? (A US Person includes a US tax resident, citizen or permanent resident/Green Card holder)

Yes No

Is the Entity controlled by a tax resident of another country? (Not including New Zealand or the United States)

Yes No

* If you have answered Yes to either of these questions, please have the controlling person complete the Foreign Tax Resident form.

4 | Change in bank details

Please attach supporting documentation.

Bank account name

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Bank

Branch

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Bank

Branch

Account number

Suffix

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5 | Regular contribution details

Please cancel all existing regular contribution instructions.

Note: If you wish to add new or amend existing regular contributions, please complete a Switch Form from the NZ Funds Advised Portfolio Service Product Disclosure Statement.

Continued over...

