

Westpac KiwiSaver Scheme

Change of Details





Use it to update your:

- Westpac personal details and/or
- Westpac KiwiSaver Scheme contribution rate and/or
- Prescribed Investor Rate (PIR).

How do I change my details?

The easiest way to change your personal details and contribution rate is in Westpac One® digital banking. If you haven't already, call **0508 972 254** or visit your local branch to get set up.

Or you can complete 'Your details' below (and any other applicable sections) and return it to us at:

-  Westpac KiwiSaver Scheme
PO Box 695
Wellington 6140
-  Any Westpac branch

How long will it take?

Generally, updates to personal details are processed within two business days of receipt. Changes may take up to five business days to show in Westpac One digital banking. Contribution rate changes will take longer as we notify Inland Revenue of your request, and Inland Revenue will notify your employer(s) to make the change.

We're here to help.

For help completing this form, call **0508 972 254** (+64 9 375 9978 from overseas) weekdays between 8.30am and 5pm. Alternatively, email us at kiwisaverhelp@westpac.co.nz.

Your checklist.

- ☐ Your fully completed form.
- ☐ If you would like to update your name, please include a certified copy of your marriage certificate, deed poll or other relevant papers. Documents must be received by Westpac within three months of being certified.

What's a certified copy?

A certified copy is a copy of an original document on which an authorised person (such as a Justice of the Peace, solicitor or other legally authorised person) has confirmed it is a true copy of the original. All certified copies must include:

- The certifier's name, occupation, signature and date.
- The following or equivalent wording: "I certify this to be a true copy of the original document as sighted by me on [date]".

The certifier can't be someone you're related to, your spouse/partner, or someone who lives at the same address.

Privacy statement.

The personal information which you provide in (or in connection with) this form will be held securely by BT Funds Management (NZ) Limited (Manager) and/or The New Zealand Guardian Trust Company Limited (Supervisor), at the address of the Manager and/or Trustees Executors Limited (the registry provider), and may also be disclosed to Westpac Banking Corporation ABN 33 007 457 141 (Westpac), Westpac New Zealand Limited (Westpac NZ) and any other entity that is involved in the administration and management of the Westpac KiwiSaver Scheme (including Inland Revenue and any regulatory body). You have the right to access and correct this information subject to the provisions of the Privacy Act 2020. Your personal information may otherwise be collected, used and disclosed in accordance with Westpac's Privacy Policy (available at westpac.co.nz/privacy).

Westpac branch use – branch checklist

Branch name

Staff name

- ☐ Form is complete
- ☐ Customer is AML compliant, current ID and proof of address has been verified/certified and loaded into Sales Customer (Assist)

Update your details

Update my details so all future Westpac KiwiSaver Scheme and general Westpac correspondence goes to the below:

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Physical address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Postal address (if different) NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Phone HOME MOBILE

Email

Westpac KiwiSaver Scheme member number K S Find it in your digital banking or on your statement.

Prescribed Investor Rate (PIR) ☐ 10.5% ☐ 17.5% ☐ 28%. Find yours at ird.govt.nz/pir

Email is our preferred way to contact you as it's a faster way to communicate with you.

Update your contribution rate

Please change my contribution rate to (please tick only one):

☐ 3% ☐ 4% ☐ 6% ☐ 8% ☐ 10%

We'll pass this instruction to Inland Revenue, who'll contact your employer to make the change. We don't hold a record of your current contribution rate, but you can check it with your employer. If you have multiple employers and change your contribution rate using this form, the contribution rate you select will apply to all your employers. If you'd like different contribution rates for different employers, then notify each employer directly by completing a KiwiSaver deduction form (available from your employer or at ird.govt.nz – search 'KS2 form').

Your authorisation – you must complete this section

Please make the changes shown above. I have read and understood the Privacy Statement. I acknowledge that the change(s) won't become effective until verified by Westpac, and for contribution rate changes, until Inland Revenue have notified my employer(s) and my employer(s) have made the change(s). If your request is instructed under a power of attorney, an attorney must also complete a certificate of non-revocation and include it with this request.

Member signature (if aged over 16 only) Name Date DD / MM / YYYY

For members under 18 only:

- If the members is aged 0-15 years, **one** parent/guardian must sign the below
- If the member is aged 16-17 years, then member must sign above, and **one** parent/guardian must sign below.

I confirm that I am authorised to sign this form on behalf of the member named above:

Parent/guardian signature Name Date DD / MM / YYYY