



New Zealand Retirement Trust (NZRT)

Change of membership details

Please send this completed form and supporting documents to:
Email workplaceadmin@amp.co.nz
or
NZRT Customer Services
Freepost 170, PO Box 55
Shortland Street, Auckland 1140

*These fields must be completed

Use this form to change your NZRT personal details.

This form can be completed on-screen by typing content directly into the PDF document. Once you have completed your details, print, sign and send the form and any supporting documents to the address above.

If you have any questions when completing this form, please contact your Adviser or call Customer Services on 0800 800 267.

A disclosure statement is available from your Adviser on request and free of charge.

(a) Your personal details (we need this information to identify you correctly in our systems)

Member number (if known):

(refer to your member statement)

*Date of birth:

*First names:

*Surname:

Employer:

Email:

Staff number:

(b) Changes you'd like to make

1. Change of name

Please update my name to the following (please attach copies of supporting documentation as evidence of this change)

*First name(s):

*Surname:

*Reason for change (please tick):

- Deed poll Marriage/divorce Separation Name recorded incorrectly

*I have attached one of the following pieces of supporting documentation:

- Marriage certificate Name change certificate Birth certificate Other _____

Please provide your old signature

Please confirm this change with your new signature in section (c)

2. Change of contact details

Please update my contact details to the following:

*Postal address:

Postcode:

Home phone:

Work phone:

Mobile phone:

Email:

3. Change of tax details

Please update my PIE tax details to the following:

PIE tax rate: 10.5% 17.5% 28%

*IRD number:

If no PIE tax rate is supplied or your IRD number is incorrect, the default PIE tax rate of 28% will be used.

Please note: If you're unsure of your PIE tax rate, please go to amp.co.nz/PIE for help or contact your Adviser or Inland Revenue.

If you are eligible for a lower tax rate and notify a higher tax rate to us in error, the IRD will not refund excess tax paid. If you notify a lower tax rate to us in error, the IRD may contact you at the end of the income tax year and require a tax return to be filed, and tax to be paid at your marginal tax rate (which could be 33%). IRD may also contact us and require us to change your rate. If you are required to file a tax return, you will receive a tax credit for tax paid by the NZRT on your behalf.

(c) Your signature

I confirm that the information contained in this form is correct and I request that AMP update its records to reflect the changes to my personal details specified in this form.

*Member signature

*Date

Please note – this form is not for advising us of a change of employer.

*Checklist

Please check you have completed the form correctly

- Have you completed all fields with an *?
- Have you completed section (a)?

- Have you attached supporting documentation if you're changing your name?
- Have you signed the form in section (c)?