



AMP KiwiSaver Scheme

Change of details form

*These fields must be completed

Please email this completed form and supporting documents to:
kiwisaver@amp.co.nz
or post to:
AMP KiwiSaver Scheme
Freeport 170, PO Box 55
Shortland Street, Auckland 1140

Use this form to change your AMP KiwiSaver Scheme 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 267 5494.

(a) Your personal details

*Member number

Title

 Mr Mrs Ms Miss Dr Other

Date of birth

*First names

*Surname

1. Change of name

Please update my name to the following (In order for us to update your name we will require supporting documentation as evidence of this change. For a change of name, this supporting documentation needs to show both your previous and new name.)

*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 (only applicable for incorrectly recorded names) Dissolution of marriage certificate

Please provide your old signature

Please confirm this change with your new signature in Section (b)

2. Change of contact details

Please update my contact details to the following:

*Postal address

Home phone

Work phone

Mobile phone

If you do not wish to receive a status update regarding your request via text message, please tick here:

Email

3. Change of tax details

Please update my tax details to the following:

Prescribed Investor Rate (PIR) 10.5% 17.5% 28% *IRD number

Portfolio Investment Entity (PIE) tax is deducted using the PIR information held by AMP. If your PIR tax details have changed, please advise your new PIR. If a PIR is not selected and has not been previously selected, or you supply an incorrect IRD number, the default rate of 28% will apply. To help determine your PIR, go to amp.co.nz/PIE or ird.govt.nz. Inland Revenue may also instruct AMP to apply a different PIR.

For tax years ending on or before 31 March 2020, if the advised PIR is lower than the correct PIR, you'll need to complete a personal tax return for the relevant year and pay any tax shortfall, interest, and penalties. For tax years ending on or before 31 March 2020, if the default rate or the advised PIR is higher than the correct PIR, you'll not get a refund of any overpaid tax for those years.

From 1 April 2020, Inland Revenue may do a calculation to work out any underpaid or overpaid PIE Tax. If you should have been on a lower PIR and have overpaid tax, Inland Revenue may give you a refund. If you should have been on a higher PIR, additional tax may be payable by you.

4. Change of contribution rate

Please change the rate I contribute from my salary or wages to:

3% 4% 6% 8% 10%

Your employer will be notified to alter your contribution rate. The new rate will only apply from the next salary or wage payment after your employer receives that notice. Please note this will not change the rate your employer contributes to your KiwiSaver account.

(b) 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**

***Checklist**

Please check you have completed the form correctly

Have you completed the personal details section?

Have you signed the form in section (b)?

Have you attached supporting documentation if you're changing your name?