

## Notice to change PIE tax details

It is important we have your correct Prescribed Investor Rate (PIR) for each financial year ending 31 March, so that you are correctly taxed. Use this form if your PIR has changed. For assistance determining your PIR refer to page 3 and 16 of the Product Disclosure Statement (PDS). For more information visit the Inland Revenue website <https://www.ird.govt.nz/toii/pir/workout/>

### Section A Your personal details

1. Your IRD Number

2. Your Member Number

3. Your name  Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

First Name(s) \_\_\_\_\_ Surname \_\_\_\_\_

4. Your Postal Address

Street Address/ PO Box \_\_\_\_\_

Suburb or RD \_\_\_\_\_

Town or City \_\_\_\_\_

Postcode

5. Date of birth \_\_\_\_\_

6. Occupation \_\_\_\_\_

7. Contact phone no \_\_\_\_\_

8. Email address

### Section B New tax rate

My new tax rate is (tick one only)

10.5%  17.5%  28%

For assistance in determining your Prescribed Investor Rate (PIR), see the chart on the flip side of this form. Additional information is available on pages 3 and 16 of the BCF Product Disclosure Statement (PDS) available on the scheme website, or you can contact Inland Revenue directly.

### Section C Acknowledgement

I understand that this change of tax details for my BCF KiwiSaver Scheme account will be implemented as soon as practicable after receiving this completed form.

Signature  Date

Return completed form and documentation to:  
 Post Original Documents: BCF KiwiSaver Scheme, C/- Melville Jessup Weaver, PO Box 1096, Wellington 6140  
 Or Courier: BCF Kiwisaver, C/- Melville Jessup Weaver, Kiwi Wealth House, Level 7, 20 Ballance Street, Wellington 6011  
 Or email: [bckiwisaver@mjlw.co.nz](mailto:bckiwisaver@mjlw.co.nz)

If you have any questions about completing this form, please call 0800 BCF INFO (0800 223 463)

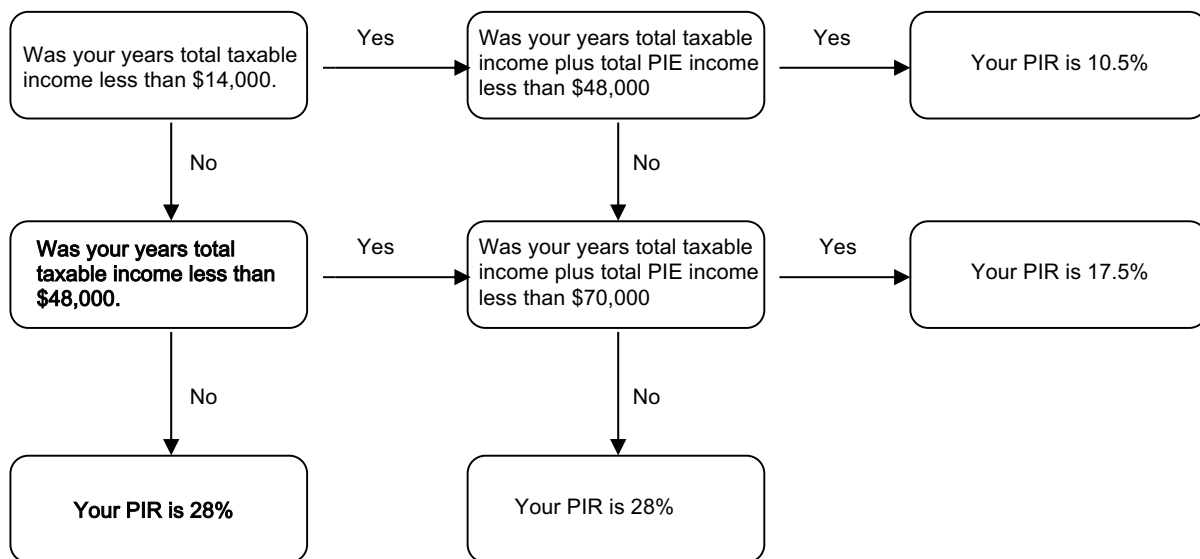
The information in this form is being collected for the purposes of effectively managing your BCF KiwiSaver Scheme account and it will be held by MJW. It may be disclosed to third parties to the extent that is necessary to administer your application and any withdrawal from the BCF KiwiSaver Scheme. You can ask to see the personal information that MJW holds about you by calling us on 0800 223 463.

### Determination of Prescribed Investor Rate (PIR)

Your PIR depends on two income amounts:

1. your total taxable income, which covers your salary, your investment returns, and
2. your total PIE income (the investment returns on your investment in PIE's).

After you have calculated your two income amounts for last year, you can use the following chart to calculate your PIR.



If your rate needs to be changed at any time, please complete and return this form via email or post:

- post Administration Manager,  
PO Box 1096, Wellington 6140, or
- email [bcfkiwisaver@mjlw.co.nz](mailto:bcfkiwisaver@mjlw.co.nz)