

Use this form to advise SuperLife of your PIR rate. Send this completed form to us at superlife@superlife.co.nz or post to us at P.O. Box 105262, Auckland City 1143.

Your PIR is the tax rate that applies to the taxable investment returns paid to your SuperLife accounts. Your PIR rate can be 10.5% or 17.5% or 28%. If you do not advise SuperLife of your PIR, the law says we must use a PIR of 28%.

PIR - 02.08.2021

Your details

IRD number: - -

SuperLife number:

Full name: _____

Date of birth: / / (dd/mm/ccyy)

Email address: _____

Your PIR (see below to work out which rate you should choose)

Until I advise you otherwise, my PIR is: (tick one) 10.5% 17.5% 28%

Your PIR will apply to SuperLife's superannuation and KiwiSaver schemes as applicable. Both referred to SuperLife.

Your signature: _____ Date: / / (dd/mm/yyyy)

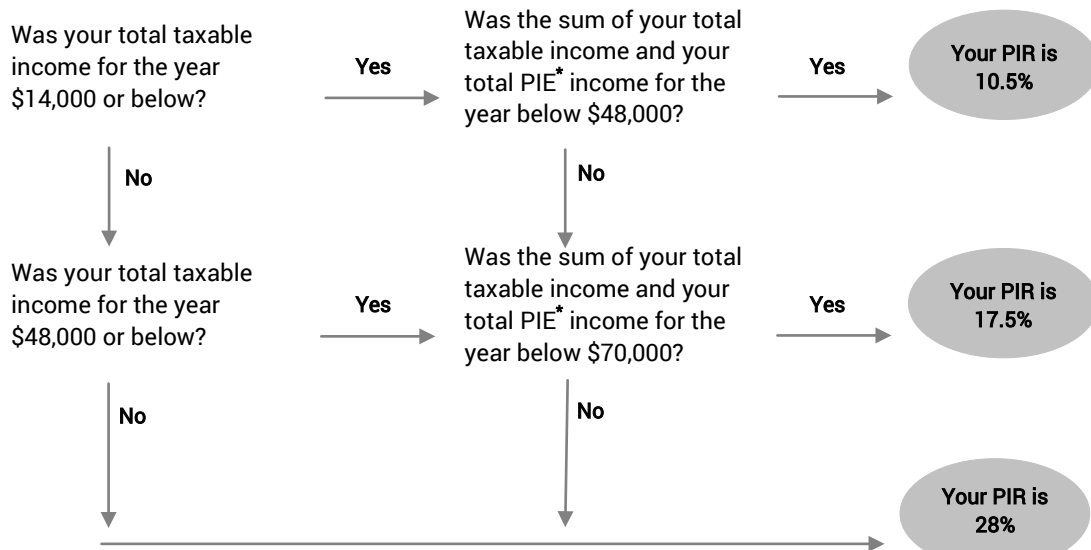
Fold this form on the lines indicated on the back, tape the end and put it in the mail or fax it to (09) 375 9801.

If you are not a New Zealand resident for tax purposes, your PIR can only be 28%.

If you are a NZ tax resident, work out your PIR using this flow chart:

Your PIR depends on your Total Taxable Income (i.e. your wages, salary, interest, dividends etc.) plus your Total PIE Income. Your Total PIE Income is the taxable investment returns you make on your funds invested in PIE vehicles like SuperLife. For more information see the understanding PIR guide on the SuperLife website.

Use this flow chart for each of the last two financial years (1 April to 31 March) and take the lowest.



*Unless you have a substantial savings balance (e.g. over \$250,000) it is unlikely that your total PIE income will be enough to get you over the \$48,000/\$70,000 threshold as applicable. The test will most likely depend on your Total Taxable Income.

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FREEPOST AUTHORITY NUMBER 108442



SuperLife (*PIR advice*)
PO Box 105262
Auckland 1143

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