

State Sector Retirement Savings Scheme

Lump Sum Deposit Form



Please return this completed form to superlife@superlife.co.nz or post to: SuperLife SMT, PO Box 105262, Auckland 1143.

SECTION 1: PERSONAL DETAILS

Member number

Scheme name

State Sector Retirement Savings Scheme

Title (Mr, Mrs, Miss, Ms, Mx, Dr or Other)

Date of birth

D	D	M	M	Y	Y	Y	Y
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First name

Surname

Home phone

Work phone

Mobile

Email

Occupation (must be supplied)

Home address

Street address	
Suburb	
Town/city	
Country	Postcode

SECTION 2: TAX DETAILS

Note: If you have already provided us with your IRD number and PIR, please ignore this section. If your PIR has changed, please tick the correct PIR. If you haven't given us your IRD number and PIR, we will apply a tax rate of 28% to any taxable income applicable to you for the relevant tax year.

IRD number (Must be supplied)

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Prescribed Investor Rate (PIR) (Tick one)

☐	10.5%	☐	17.5%	☐	28%
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Refer to ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate to calculate your PIR.

SECTION 3: FUND SELECTION FOR ADDITIONAL INVESTMENT

I wish to invest the following amount \$ in accordance with my existing fund selection
OR as indicated below into my SuperLife Superannuation Master Trust account.

I have paid via internet banking into the SuperLife Superannuation Master Trust bank account

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D	D	M	M	Y	Y	Y	Y
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Note: Please ensure that any payments made via internet banking can be identified. The reference fields should contain your State Sector Retirement Savings Scheme member number and your surname and initials.

Funds	Investment amount (\$ value)
SuperLife SMT Moderate Fund	\$
SuperLife SMT Balanced Fund	\$
SuperLife SMT Growth Fund	\$
SuperLife SMT NZ Cash Fund	\$
SuperLife SMT NZ Fixed Interest Fund	\$
SuperLife SMT World Fixed Interest Fund	\$
SuperLife SMT Australasian Shares Fund	\$
SuperLife SMT World Shares Fund	\$
SuperLife SMT Global Property Shares Fund	\$
Total	\$

SECTION 4: PRIVACY AUTHORISATION

The personal information you provide in this form, and any information you provide to us in the future, will be collected by Smartshares Limited (Smartshares), as Manager of the SuperLife Superannuation Master Trust, for purposes relating to the administration, operation, management and marketing of the scheme. Your personal information will be collected, used, stored and disclosed in accordance with the Privacy Act 2020 and SuperLife's Privacy Policy, which is available at superlife.co.nz/legal/privacy-policy.

You have the right to access and request correction to any personal information that you have supplied to Smartshares, by contacting superlife@superlife.co.nz.

SECTION 5: AUTHORISATION AND SIGNATURE

- I understand that the capital value of this Investment can rise or fall depending on market conditions. I may therefore receive back less than I invested.
- I understand that my lump sum contribution will be invested as soon as practicable after receipt of this completed form.
- I grant express consent for the manager, Smartshares Limited (Smartshares) to disclose my information to its related companies.
- I acknowledge that making a fund selection is my responsibility, and that neither Smartshares nor the Supervisor is to be regarded as representing or implying that my fund selection is appropriate for my personal circumstances; and my fund selection will be a binding direction from me to the Manager.

Member's signature

Date

D	D	M	M	Y	Y	Y	Y
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