



# Ports Retirement Plan

## Update Contact Details

First Names: \_\_\_\_\_

Surname: \_\_\_\_\_

Email: \_\_\_\_\_

Cell phone: \_\_\_\_\_

Member Number: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

IRD Number

PIR Tax Rate: 10.5 %  or 17.5%  or 28.0 %  Tick one

*If you do not select a tax rate the default rate will be 28%.*

### To determine your PIR, go to:

<https://www.ird.govt.nz/income-tax/income-tax-for-individuals/types-of-individual-income/portfolio-investment-entity-income-for-individuals/prescribed-investor-rates/find-my-prescribed-investor-rate>

### Declaration:

I acknowledge that it is my responsibility to advise the Trustees of my correct tax rate and that:

- failure to advise a change from a lower tax rate to a higher tax rate may mean that I am personally liable to pay any tax shortfall and may have to file a tax return;
- failure to advise a change from a higher tax rate to a lower tax rate may result in my having more tax deducted than should be with no ability to recover the overpaid tax.

\_\_\_\_\_  
Member signature

\_\_\_\_\_  
Date signed

- Member to sign and date above
- Attach a photo of both sides of your drivers licence
- Email to [makayla.gilmour@mjlw.co.nz](mailto:makayla.gilmour@mjlw.co.nz) or [wgtn@mjlw.co.nz](mailto:wgtn@mjlw.co.nz)

**Administration Manager** - Freephone 0800 728 370

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**Plan Secretary** - Level 1 Tramways Building, Thorndon Quay, Wellington, P O Box 4197 Tel 04 499 2066