

Aurora KiwiSaver Scheme Change of Details Form

Please email the completed form and supporting documents to: hello@aurora.co.nz
or post to: **Aurora KiwiSaver Scheme, PO Box 606, Christchurch, 8140.**

Use this form to change your Aurora 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 including any supporting documents to the email or postal address above.

If you have any questions when completing this form, please contact your Adviser or call Aurora Client Care on 0508 287 672.

**These fields must be completed*

1. Personal Details

*Member Number:

Title (please tick)

Mr Mrs Miss Ms Dr Other

Date of Birth

/ /

*First Name(s)

*Surname

2. Change of Name

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.

Please update my name to the following:

*First Name(s)

*Surname

*Reason for change (please tick)

Deed poll Marriage/Divorce Separation Name recorded incorrectly

*I have attached one of the following 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 overleaf in Section 5.

3. Change of Contact Details

Please update my contact details to the following:

Residential Address (*not a PO Box*):

Number Street Suburb

City Postcode Country

Postal Address (*if different from Residential*)

Home Phone () Work Phone () Mobile Phone ()

Email

4. 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 Aurora. 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 ird.govt.nz or click [here](#). Inland Revenue may also instruct Aurora 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.

5. Your Signature

I confirm that the information contained in this form is correct and I request that Aurora updates 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 attached supporting documentation if you're changing your name?
- Have you completed the personal details section? (*See Section 1*)
- Have you signed the form? (*See Section 5*)