

SIL Mutual Fund Prescribed Investor Rate (PIR) Form



Please print in black or blue pen, in uppercase, one character per box and all that apply.

You can change your PIR online. Please sign in to www.silfunds.co.nz and follow the instructions.

Tax years for the Fund and most members run from 1 April to 31 March. The Administration Manager will continue to apply a PIR that you have notified until you notify an updated PIR, or Inland Revenue may advise us to change your PIR if they identify that you're on the wrong rate. If you believe Inland Revenue hasn't given us the correct PIR, you can change your PIR subsequently. It is recommended you contact Inland Revenue to discuss why you believe their information is incorrect.

It is your responsibility to make sure that the PIR being applied by the Administration Manager is one that you are eligible for in that tax year.

If you need assistance completing this form, please feel free to contact our toll-free Helpline on **0800 405 845**.



Privacy statement

Information in this form and any requested documents are being collected to enable administration of this account. The Privacy Act entitles the account holder to access and to request correction of any personal information.

Step 1 – Complete your personal details

Membership number

IRD number

Title: Mr Mrs Ms Miss Other

Date of birth

First name

Middle name(s)

Surname

Residential address

Number	Street name
Suburb	
City	Postcode
Country	

Mailing address (if different from residential address)

Number	Street name
Suburb	
City	Postcode
Country	

Telephone

Mobile

Home phone

Email

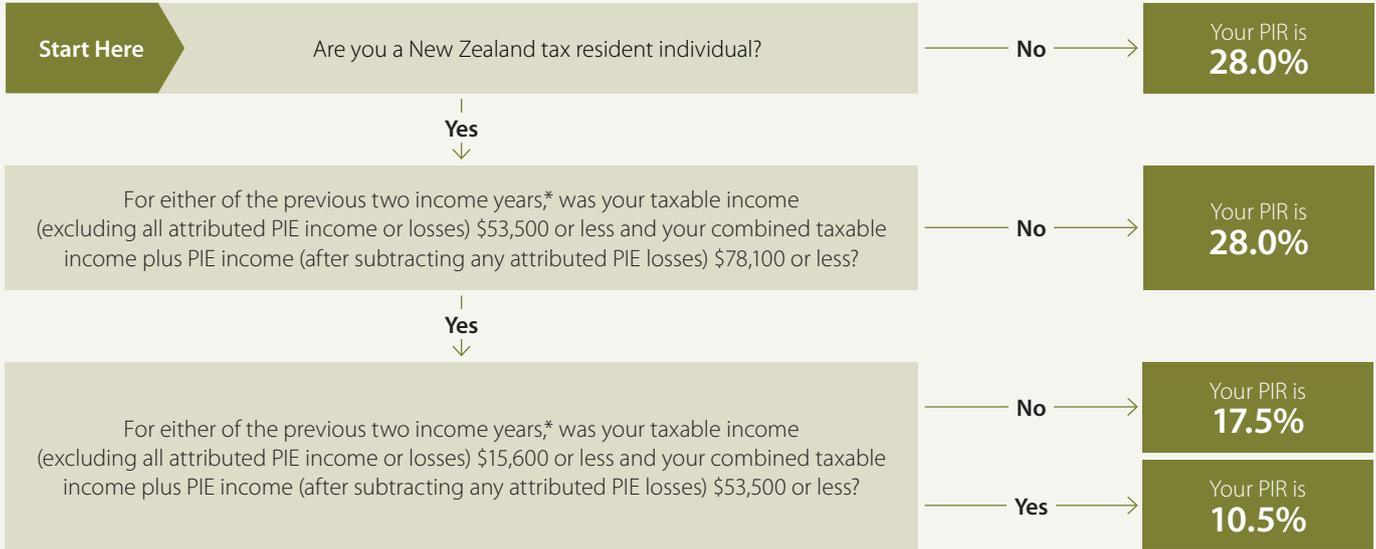
Membership number

Step 2 – Change your PIR

Please select your PIR for the current tax year:

10.5% 17.5% 28%

You can use the diagram below as a guide to work out your PIR. Additional detail is also provided on the Inland Revenue website; 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.



***Previous two income years** refers to the two years prior to the tax year that the PIR is being applied to. An **income year** is generally 1 April to 31 March of the following year.

Step 3 – Sign the form

By signing this form, I understand that:

- Any changes will be effective from the date the change is made by the Administration Manager.
- The Administration Manager will not action my request if in the Administration Manager’s opinion any information is incomplete or ambiguous.
- To administer my account, the Administration Manager may disclose my personal information to my employer (if applicable for the SIL Employer Scheme), my tax or financial adviser and other third parties (including any parent/guardian) as required to the extent necessary for the purposes of verifying my identity, as well as providing and managing my account. My personal information may also be used and/or shared with third parties authorised by the Administration Manager for the purpose of introducing products and services. I consent to the handling of my personal information in this way.

Signature

Date / /

Please return your completed form to: Mercer (N.Z.) Limited, Freepost Authority Number 3629, PO Box 1849, Wellington 6140 or email it to sil@mercerc.com.