

# Prescribed Investor Rate (PIR) Update

If you would like help in completing this form, please email [enquiries@fisherfunds.co.nz](mailto:enquiries@fisherfunds.co.nz) or phone us on 0508 FISHER (0508 347 437).

You can complete this form on-screen by typing directly into each field. Once you have completed your details, please print, sign and post the form to **Fisher Funds Management Limited, Private Bag 93502, Takapuna, Auckland 0740** or email to [enquiries@fisherfunds.co.nz](mailto:enquiries@fisherfunds.co.nz).

## Who should complete this form?

Please use this form to update your Prescribed Investor Rate (PIR) for your Fisher Funds account/s. If you hold more than one account under different entity structures (e.g. an individual KiwiSaver account and a Managed Funds account in the name of a Trust) and wish to update your PIR for all accounts, please complete a form for each separate entity. This is because signatories between those accounts will differ.

## Section 1 – Account details

Client name

Fisher Funds account number

IRD Number

Address

City

Country

Postcode

Home phone

Business phone

Mobile

Email address

## Section 2 – PIR update

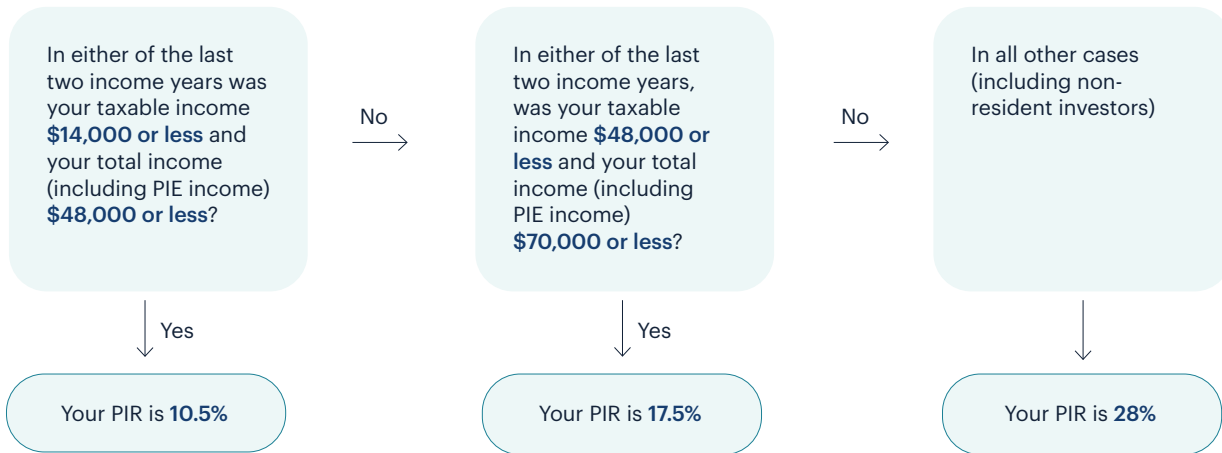
Update Prescribed Investor Rate (PIR) to – *please tick one*

0%    10.5%    17.5%    28%

To calculate your PIR, follow the guide below. If you are unsure which PIR rate to use, please speak to your accountant.

If this form is being completed for a member under the age of 16, the member's parent or legal guardian must sign. If the form is being completed for a member who is over the age of 16 but under the age of 18, the member must sign under **Signature of Investor** and the member's parent or legal guardian (if any) must sign under Signature of **Parent/Legal Guardian**. By signing you acknowledge and confirm you are the member's parent or legal guardian.

### How to calculate your PIR



Other investors	PIR
Non-Resident Investor	28%
Company, Unit Trust, Charity or Non-Profit Organisation	0%
Trust (excluding Charitable Trusts and Unit Trusts) choose the rate to best suit your beneficiaries	0%, 17.5%, or 28%

*Note: Trustees of a Testamentary Trust may also choose 10.5%*

## Section 3 – Signatories of all account owners

I authorise you to update my Fisher Funds account as indicated above.

Signature of investor

Date

 /  / 

Signature of parent/legal guardian

Date

 /  /