



You can scan the completed application form and other listed requirements and email them to **support@goalsgetter.co.nz** or post them to:

GoalsGetter KiwiSaver Scheme

PO Box 3892, Shortland Street, Auckland 1142

Your Personal Details

Title:

First name(s):

Surname:

Home address:

Street:

Suburb:

City:

Postcode:

Postal address: (if different
from above)

Street:

Suburb:

City:

Postcode:

Contact Phone:

Email:

Date of Birth
(dd/mm/yyyy):

IRD number:

PIR Rate:

☐ 10.5%

☐ 17.5%

☐ 28.0%

The tax rate applied to the account will be determined by the ownership of the account.

If you don't provide us with your PIR, the top rate will be applied. If your PIR changes, please notify us. If you're not sure what your rate is see <http://www.ird.govt.nz/toii/pir/workout>

Are you transferring from another KiwiSaver Scheme?

☐ Yes

☐ No

Current Provider (if known):	
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How To Make a Contribution

We'll send details of how to make a lump sum contribution once we've processed the application.

Regular contributions will be allocated in proportion to the investment options you select below.

The minimum regular investment for all funds is \$20.

Tax Residency

We need you to answer a couple of extra questions, so if you decide you later want to invest in our retail funds, you're ready to go.

Are you a US citizen or US tax resident?

☐ Yes

☐ No

If yes, please provide your taxpayer
identification number (TIN):

Are you a tax resident of any other country other than NZ or the US? If yes, please list below:

Country of Tax Residence	TIN (or reason why TIN was unable to be obtained)

For further information on you personal tax residency status you made need to speak to a tax adviser.

Investment options

There are 20 funds to choose from – information about each fund is available in the PDS.

You can choose to invest in either one fund or a mix of funds.

Funds

Funds Name	% Allocation
GoalsGetter Generate Focused Growth Fund	
GoalsGetter Milford Aggressive Fund	
GoalsGetter Amova High Growth Fund	
GoalsGetter Harbour Active Growth Fund	
GoalsGetter Milford Active Growth Fund	
GoalsGetter Amova Growth Fund	
GoalsGetter Pathfinder Ethical Growth Fund	
GoalsGetter Salt Capital Growth Fund	
GoalsGetter Generate Balanced Fund	
GoalsGetter Harbour Sustainable Impact Fund	
GoalsGetter Milford Balanced Fund	
GoalsGetter Amova Balanced Fund	
GoalsGetter Milford Conservative Fund	
GoalsGetter Amova Conservative Fund	
GoalsGetter Generate Thematic Fund	
GoalsGetter Amova ARK Disruptive innovation Fund	
GoalsGetter Amova Global Shares Fund	
GoalsGetter Amova SRI Equity Fund	
GoalsGetter Amova NZ Cash Fund	
GoalsGetter Amova NZ Corporate Bond Fund	
Total	

You can select the funds in increments of 1% - your selection must add to 100%

Identification

As part of your application, we need to verify your identity. We do this electronically – please provide one of the following:

New Zealand Passport number:	
Expiry date (dd/mm/yyyy):	

OR

New Zealand driver license number:	
Expiry date (dd/mm/yyyy):	
Version Number:	

If you do not hold either of these, please contact us for other options.