

Notice of prescribed investor rate change



Please let us know if your PIR has changed, or if we don't have your correct IRD number. This is so we can ensure you are correctly taxed on your investment.

If you have changes please complete and sign this form, and return it to:

Public Trust Contact Centre
16 Hickory Place, Islington
PO Box 13853
Christchurch 8001

For further information please call our contact centre on 0800 371 471 between 8.00am and 5.30pm, Monday to Friday.

Your account

Title & family name
Given name(s)

Public Trust customer number (if known)

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Your prescribed investor rate

Please remember – if your account is held in joint names, you need to apply the PIR appropriate to the highest income earner. Please tick the appropriate PIR* below:

0% 10.5% 17.5% 28%

* For more information on determining your PIR rate, please visit Inland Revenue at www.ird.govt.nz or phone 0800 227 774

Your IRD number

Please let us know your IRD number in the space below, as we need this to apply the PIR you confirm. Please remember – if your account is held in joint names, we'll need the IRD number of the highest income earner.

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Signed: _____

Dated: _____

Signed: _____

Dated: _____

Are you a New Zealand resident taxpayer?

Yes

No

Your PIR is 28%



How is your investment held?

Your own / joint name

Your PIR rate is worked out depending on your taxable income and your portfolio investment entity (PIE) income in either of the past two tax years¹.

Taxable income	Taxable income plus PIE income	Your PIR is...
\$0 - \$14,000	\$0 - 48,000	10.5% <input type="checkbox"/>
\$0 - \$14,000	\$48,000 - \$70,000	17.5% <input type="checkbox"/>
\$14,001 - \$48,000	\$0 - \$70,000	17.5% <input type="checkbox"/>
Over \$48,000	Any	28% <input type="checkbox"/>
Any	Over \$70,000	28% <input type="checkbox"/>

Trust

Does your trust elect to have investments taxed at 28%? (This means you do not have to include income in your trust tax return.)

Yes

Elect a PIR of 28%

You can elect a PIR of either 0%, 10.5% (if a testamentary trust) or 17.5%. You will need to include this income in the trust's tax return.²

No

No

Company or charity

Your PIR is 0%³

¹ Joint account holders will be treated as a single account holder with a PIR equal to the PIR of the joint account holder with the highest income.
² We recommend you seek independent tax advice before choosing a 0% PIR, 10.5% PIR (if a testamentary trust, i.e. a trust created through a Will), or 17.5% PIR.
³ If a company, you need to include this income in your tax return.