

## Preferred Provider Application Form

If you would like help completing this form, please email [info@generatekiwisaver.co.nz](mailto:info@generatekiwisaver.co.nz) or phone us on 0800 855 322.

### Employer Details

Please complete this form to select the Generate KiwiSaver Scheme for your business.

Employer Entity \_\_\_\_\_

IRD No.

If you don't know your IRD number, please call the IRD on 0800 227 774 or visit [www.ird.govt.nz/tasks/find-my-ird-number](http://www.ird.govt.nz/tasks/find-my-ird-number)

Entity Registered Name \_\_\_\_\_

Trading Name \_\_\_\_\_

Number of Employees \_\_\_\_\_

Adviser Code \_\_\_\_\_

KiwiSaver Scheme Adviser \_\_\_\_\_

Please use the same Employer IRD Number and Entity Registered Name as those held by the Inland Revenue for PAYE for tax of employees.

### Employer Contact:

Title \_\_\_\_\_

First Name \_\_\_\_\_

Surname \_\_\_\_\_

Job Title \_\_\_\_\_

Phone \_\_\_\_\_

Mobile \_\_\_\_\_

Email \_\_\_\_\_

Physical Address \_\_\_\_\_

Suburb \_\_\_\_\_

City \_\_\_\_\_

Postcode \_\_\_\_\_

Postal Address (if different from above) \_\_\_\_\_

Suburb \_\_\_\_\_

City \_\_\_\_\_

Postcode \_\_\_\_\_

### Privacy Statement

Generate Investment Management Limited (or Generate group companies), Public Trust, any of their authorised agents, and any distributor (each an "Authorised Person") may collect personal information that you provide to us. Generate will (or through MMC New Zealand Limited will) hold the information securely. Your information will be used by Generate and the Supervisor to manage your relationship with Generate and the Supervisor, to provide products and services to you, to comply with any applicable laws, to offer you further products and services that may be of interest to you and for any other use for which you have given authorisation. We may also disclose your personal information for these purposes to our staff members, related companies, our third party service providers and to the Financial Markets Authority or other applicable regulators.

Generate may further use your information to electronically verify your details and your information may also be disclosed for these purposes to third parties where Generate have further contracted to carry out the verification process.

If you contact us or we contact you, we may keep a record of that contact. We may also monitor and record calls you make to us and we make to you. You may request the information held about you, and if any of the information is incorrect, ask for it to be corrected. You can do this by contacting us by email or call us on 0800 855 322.

### Acknowledgements

- I understand that this appointment will continue until written or verbal revocation of the appointment is received by Generate Investment Management Limited (Generate) and the Inland Revenue.
- The Entity appoints the Scheme as the chosen KiwiSaver Scheme for the Entity's employees who will be automatically enrolled into KiwiSaver and those employees who choose to opt in to KiwiSaver.
- I authorise Generate to notify the Commissioner of Inland Revenue that the Scheme is the Entity's chosen KiwiSaver Scheme for the purposes of section 46 to 49 of the KiwiSaver Act 2006. The Entity's choice of Scheme shall be effective from the date the notice is accepted by the Commissioner of Inland Revenue, and may be terminated in accordance with the KiwiSaver Act 2006.
- The Entity will comply with its obligations under the KiwiSaver Act 2006 and the KiwiSaver Regulations including distributing the Generate KiwiSaver Scheme Product Disclosure Statement to employees.
- Any employees who do not select their own fund choice will be defaulted to the Scheme "stepping stones" investment option. The employees KiwiSaver savings will be automatically invested across the six Scheme funds based on their age. Please see the Generate Product Disclosure Statement for more details.
- The Entity agrees that all of their permanent employees are eligible to be members of the Scheme.
- The Entity agrees to verify the identity of all employees entering the Scheme before entering the Scheme, in accordance with the Financial Transactions Reporting Act 1996. The Entity will keep appropriate records of the identity verification and will provide this reasonably on request by Generate.

### Authorised Signatory

Name \_\_\_\_\_

Position \_\_\_\_\_

Signature \_\_\_\_\_

I authorise Generate to pass on the information above to the Commissioner of Inland Revenue on behalf of the Entity.