

## Preferred Provider Application Form

Need help with this form? Call us on **0800 855 322**.

### Employer Details

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

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

IRD No.

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

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

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

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 Act

Generate Investment Management Limited, Public Trust, any of their authorised agents, and any distributor assisting with the application (each an "Authorised Person") may collect personal information about the member provided in connection with this application or the Scheme, will (or through MMC Limited will) hold the information securely and may use the personal information to manage the member's investment in the Scheme, to communicate with the member or to promote other products and services to the member. The member may ask that he or she be shown the information held about the member, and if any of the information is incorrect, ask for it to be corrected. The addresses for Generate Investment Management Limited, Public Trust and MMC Limited are set out in the Product Disclosure Statement for the Scheme.

### 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 "life stages" investment option. The employees KiwiSaver savings will be automatically invested across the three 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 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.**