

Application for Membership of the Local Government Superannuation Scheme



Am I eligible to join?

To join the Local Government Superannuation Scheme you must be employed by a participating employer of the Scheme. Speak to your employer if you are unsure if they participate in the Scheme, or contact us.

What's Next?

Return this form to your council employer, who will then pass this on to us. Any information missing from this application may delay your application.

Any Questions?

If you have any questions please contact us on 04 978 1250 or at admin@supereasy.co.nz

This application form relates to the Local Government Superannuation Scheme product disclosure statement dated 2 August 2021.

A. Personal Details

Title	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	First name(s)					Surname			
Home address	Number & street	Suburb		Town/city		Postcode			
Postal address <small>(if different to above)</small>	Number & street	Suburb		Town/city		Postcode			
Phone	Home			Mobile					
Email address									
Employer name									
Employment start date									
Your Prescribed Investor Rate (PIR): <input type="radio"/> 10.5% <input type="radio"/> 17.5% <input type="radio"/> 28% Choose one. Visit www.ird.govt.nz/toii/pir/workout for information on how to calculate your PIR. If no option is selected the 28% rate will apply.									

B. Contributions

Your contributions:	Percentage of salary	<input type="text"/>	%	OR	Dollar amount	<input type="text"/>	\$
Employer contributions:	Percentage of salary	<input type="text"/>	%	OR	Dollar amount	<input type="text"/>	\$
Frequency of contributions: <input type="radio"/> Weekly <input type="radio"/> Fortnightly <input type="radio"/> Monthly							

C. Investment Fund/s

Automatic Fund	<input type="text"/>	%	This must total 100%. You can invest in as many funds as you like, however the minimum that can be invested in a fund is 20%. If you don't select a fund, or if your percentage allocated totals less than 100%, the full or remaining amount will be allocated to the Automatic Fund.
Aggressive Fund	<input type="text"/>	%	
Growth Fund	<input type="text"/>	%	
Balanced Fund	<input type="text"/>	%	
Conservative Fund	<input type="text"/>	%	
Total:	100%		

D. Tax Residency

I am only a tax resident in New Zealand (continue to **Section E**)

I am a tax resident of more than one country (please list each of these below)

Country/jurisdiction of tax residence	Taxpayer identification number (TIN)	Reason no TIN available (see below)
1.	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>

If a TIN is unavailable please provide the appropriate reason (A, B or C) as detailed below:

Reason A - The country/jurisdiction does not issue TINs to its residents
Reason B - The country does not require the collection of TINs under domestic law
Reason C - You are otherwise unable to obtain a TIN, or equivalent number. If you have selected this reason, please attach explanation as to why you are unable to obtain a TIN.

Signature required overleaf

V8.21

E. Signature and Acknowledgements

By signing this Form you confirm that you have received and read the Local Government Superannuation Scheme Product Disclosure Statement dated 2 August 2021 (PDS) and relevant Benefit Summary. You agree to be bound by the terms and conditions set out in the PDS and Trust Deed, this application form and any register entry (held on <https://disclose-register.companiesoffice.govt.nz>) relating to the Local Government Superannuation Scheme. You are also confirming that:

1. You meet the eligibility criteria to join the Local Government Superannuation Scheme.
2. You authorise your Employer to deduct contributions (if any), as agreed, from your salary in accordance with the rules of the Scheme, **OR** you will provide your bank with a completed automatic payment authority and the payments to the scheme will not be less than \$520 per annum (\$20 per fortnight).
3. You authorise your Employer, the Trustee of the Scheme, and any Administration Manager to provide and disclose to any persons information held by the Trustee about you for any reasonable purpose as detailed in the Privacy Statement. This includes your information being passed to and checked with the document issuer, official record holder, a credit bureau (your information may be checked against a credit file header database - this is not a credit check) and authorised third parties for the purpose of verifying your identity and address.
4. You consent to information and communications in respect of the Scheme being provided to you via the SuperEasy website (www.supereasy.co.nz), or by email or any other electronic means.
5. You have read and agree to the Privacy Statement and consent to the collection, disclosure and retention of information as set out in the Privacy Statement.

Signature

Privacy Statement

The personal information you have provided in this Form, or that you provide in the future, will be collected and held by Civic Financial Services Limited as Administration Manager for purposes of marketing, operation and management of the Local Government Superannuation Scheme, and compliance with any laws, rules and regulations in New Zealand, or in any other country, including the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 and the Common Reporting Standard for the Automatic Exchange of Information as it applies in New Zealand.

Your personal information may be disclosed to the following:

- Inland Revenue (who may share the information with overseas tax authorities under intergovernmental agreements to exchange financial account information)
- your employer
- Financial Markets Authority
- any other persons or entity

where it is relevant to do so for the purposes set out above.

If you do not provide some or all of the information requested in this form, we may not be able to accept your application.

You have the right to know what personal information the Local Government Superannuation Scheme's Administration Manager is holding in respect of you. Pertinent details will be shown on your Member Statements. You also have the right to request that we correct your personal details if they are wrong. You can do this by contacting the Administration Manager at: Civic Financial Services Limited, PO Box 5521, Wellington 6140. Any update to your personal information may be used to update other information the Administration Manager holds for you.

Date of application

Office use only

Accepted
(For and on behalf of the Trustee)

Date accepted