Change of trustee(s) name

Application form

Use this form to update the trustee(s) recorded against a trust holding. This is a factual update supported by legal documentation, not a change of ownership.

You'll need to attach a certified copy of the Deed of Appointment, Deed of Retirement, or Death Certificate supporting this change.

Submit your form

BY EMAIL
registry@sharesies.com

BY MAIL
Sharesies Registry
PO Box 6833, Victoria Street West, Auckland 1142

A Registered holder details

CSN (or Holder Number)

List one company/issuer on the CSN (or Holder Number)

Full name(s) of registered holder(s), exactly as shown on the register

Registered address, exactly as shown on the register

Unit/Level

Street number

Street name (or PO Box)

Suburb/town/city

Postcode

Country

B New trustee details

Attach a certified copy of the Deed of Appointment, Deed of Retirement, or Death Certificate that supports this change.

Full name(s) of the new trustee(s)

Contact name

Mobile number

D Signature of trustee(s)—all must sign

You'll need to get your signature witnessed by an authorised person as part of your application.

How to get your signature witnessed:

1. Take a printout of this form and some photo ID to an authorised person who can watch you sign the form. Don't sign the form beforehand. Most people go to a Justice of the Peace as it's free. On the right are some other options you can use.
2. Get the authorised person to confirm your identity by showing them your ID.
3. Fill out and sign the next page in front of the authorised person, and they'll do the same.
4. If you have any documents that need to be certified as true copies as part of this application, you can ask the authorised person to certify them.

Authorised persons

- Justice of the Peace (JP)
- registered lawyer in New Zealand
- Notary Public (fees may apply)
- Registrar or Deputy Registrar of the High Court or of any District Court

The authorised person cannot be a buyer, seller, or a person named in this transfer.

If you're signing on behalf of a company, print your name and tick your role. If the company has more than one director, at least two directors must sign.

I/We authorise Sharesies to update the name of trustee(s) as set out in this form.

Investor 1 (Individual)	**Joint investor 2 (Individual)**	**Joint investor 3 (Individual)**
Signature	Signature	Signature
Print name	Print name	Print name
Role (tick one): ☐ **Director** ☐ **Director & Secretary** ☐ **Sole Director & Secretary**	Role (tick one): ☐ **Director** ☐ **Director & Secretary** ☐ **Sole Director & Secretary**	Role (tick one): ☐ **Director** ☐ **Director & Secretary** ☐ **Sole Director & Secretary**
Certified and witnessed by authorised person	**Certified and witnessed by authorised person**	**Certified and witnessed by authorised person**
Certifier/witness signature	Certifier/witness signature	Certifier/witness signature
Print name and qualification of certifier/ witness	Print name and qualification of certifier/ witness	Print name and qualification of certifier/ witness
Date (DD/MM/YYYY)	Date (DD/MM/YYYY)	Date (DD/MM/YYYY)

Privacy: Section 87 of the Companies Act 1993 requires certain information about you as an investor (including name, address and details of securities held) to be included in the issuer's public register. Contact registry@sharesies.com for details of what we hold about you.