IRD number and tax rate election

Utility form

Use this form to add or update the IRD number and resident withholding tax (RWT) rate held against your holding.

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

Email address

By adding your email, you'll get your communications sooner—we'll email them instead of posting them.

B IRD number(s) of registered holder(s)

Complete ONE option below, based on the registered holder's investor type.

OPTION 1 Individual/Joint

Registered holder 1	Registered holder 2	Registered holder 3
Full name	Full name	Full name
IRD number	IRD number	IRD number
Date of birth (DD/MM/YYYY)	Date of birth (DD/MM/YYYY)	Date of birth (DD/MM/YYYY)

OPTION 2 Company/partnership/trust/estate/minor

What is the investor type of the registered holder?

☐ Company ☐ Partnership ☐ Trust ☐ Estate ☐ Minor

IRD number

C Elect your tax rate

The resident withholding tax (RWT) rate you select here will apply to non-dividend payments. Under Inland Revenue rules, RWT on dividends is a flat 33% (28% for companies). Each holding can only have one tax rate, so select a single rate for all transferees.

Select your resident withholding tax (RWT) rate:

☐ 10.5% ☐ 17.5% ☐ 28%* ☐ 30% ☐ 33% ☐ 39% ☐ Exempt

*28% is only available for companies.

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.