

# TRUST - INVESTOR APPLICATION

PO Box 8092, Symonds Street, Auckland 1150 | Level 2, 35 Karaka St, Eden Terrace 1010  
Ph: 09 372 2278 | Email: info@rocketfinance.co.nz | www.rocketfinance.co.nz



## TRUST NAME

Name of Trust (as per trust deed):

## TRUSTEES

First name(s):

Surname:

First name(s):

Surname:

First name(s):

Surname:

## CONTACT PERSON FOR TRUST

Name:

Address:

Postal address:

Home phone:

Work phone:

Mobile:

Email:

## BANK DETAILS FOR INTEREST Please supply deposit slip or bank statement as confirmation of account number

Bank account name:

Bank and branch:

Full bank account number:

IRD number:

Tax deduction rate (please tick)    33%            Other            %            Exempt (Please provide exemption certificate)

Are you a tax resident of a country **other** than New Zealand?

No (no further information needed)

Yes If you have answered Yes, please complete the following:

What country is the company a tax resident of? :

What is your Company's Tax Identification Number (TIN):

By signing this application form, I/we confirm that I/we have read, understood and agree to be bound by the terms of the Investor Agreement and General Terms and Conditions that govern my/our investments through Rocket Finance.

**SIGNATURE:**

**DATE:**    /    /

**Signed by:**

**SIGNATURE:**

**DATE:**    /    /

**Signed by:**

# TRUST - INVESTOR APPLICATION

PO Box 8092, Symonds Street, Auckland 1150 | Level 2, 35 Karaka St, Eden Terrace 1010  
Ph: 021 2803075 | Email: [nick@rocketfinance.co.nz](mailto:nick@rocketfinance.co.nz) | [www.rocketfinance.co.nz](http://www.rocketfinance.co.nz)



## DOCUMENTS REQUIRED

Certified photo identification for each person named (Please refer to the Identification Requirements Sheet)

Certified verification of your address for each person named (Please refer to Document Verification Sheet)

Proof of bank account number

Trust deed - including any deeds appointing or removing trustees

Tax exemption certificate - if applicable

**Privacy Act** – Rocket Finance will ensure that the information about you is held securely and will not, except when authorised by you or when required or authorised by law, disclose the information to another person. You have the right to see and correct information about you held by us.

**Resident Withholding Tax** - IRD numbers are requested due to the requirements of Section 54(1) of the Tax Administration Act 1994. In the case of a joint application all persons must sign the application.

The information in this document is being collected for the purposes of meeting our requirements under the Anti-Money Laundering and Counter Financing of Terrorism Act 2009 and it will be held by Rocket Finance. It may be disclosed to third parties to meet our requirements under the AML/CFT Act 2009.