

INDIVIDUAL - 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



PERSONAL - First Applicant

First name(s) _____

Surname _____

Mobile _____

Home phone _____

Email _____

Address _____

Postal address (if different) _____

IRD number _____

Investor's country of birth: _____

Is the Investor a New Zealand resident for tax purposes?

Yes No (If no, state the taxpayer's country of residence for tax purposes):

Tax deduction rate (please tick)

10.5% 17.5% 30% 33%
non-resident Exempt (provide certificate)

PERSONAL - Second Applicant

First name(s) _____

Surname _____

Mobile _____

Home phone _____

Email _____

Address _____

Postal address (if different) _____

IRD number _____

Investor's country of birth: _____

Is the Investor a New Zealand resident for tax purposes?

Yes No (If no, state the taxpayer's country of residence for tax purposes):

Tax deduction rate (please tick)

10.5% 17.5% 30% 33%
non-resident Exempt (provide certificate)

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 _____

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** / /

SIGNATURE _____ **DATE** / /

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

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.

Identity Confirmation - Please supply certified copies of your valid proof of identity and proof of residential address details of which are described on the Identification Requirement and Document Verification sheets.

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 the form 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 maybe disclosed to third parties to meet our requirements under the AML/CFT Act 2009.