

# HEARTLAND DEPOSIT

APPLICATION FORM

# HEARTLAND

Building Society

All deposits are issued by Heartland Building Society (Heartland). Heartland comprises the former businesses of CBS Canterbury, MARAC, PGG Wrightson Finance and Southern Cross Building Society.

## INVESTOR DETAILS

Existing Investor - My Investor Number is

New Investor (please tick one)

Investor  Mr/Mrs/Miss/Ms/Dr/Trustee (please circle) First names in full

Surname  Date of Birth / /

Joint Investor  Mr/Mrs/Miss/Ms/Dr/Trustee (please circle) First names in full

Surname  Date of Birth / /

Company / Club / Society / Trust (if applicable) (please circle)

Residential Address

City or Town  Postcode

Mailing Address (if different from above)

City or Town  Postcode

Email Address  Phone No. (hm) ( )

Phone No. (mobile) ( )  Phone No. (wk) ( )

## TAX DETAILS

IRD no. investor

IRD no. Joint investor

IRD no. Company/Trust

Please note: If we do not have your IRD number on file, we are required to deduct resident withholding tax (RWT) at 33%.

NZ residents, please indicate your choice of RWT rate below. If exempt, please provide copy of exemption certificate.

10.5%  17.5%  30.0%  33.0%

or Exempt

Non-residents please indicate

NRWT  AIL

## INVESTMENT INFORMATION

I would like to invest \$  at  % p.a. for  Years / Months / Days  (please circle one)

Minimum investment \$1,000.

OR  / /  to specific maturity date  OR  on call (tick if applicable)

## INTEREST PAYMENT OPTIONS (Please tick one box to show how you would like your interest paid)

Quarterly compounding (on the last days of March, June, September and December).

Quarterly direct credit (on the last days of March, June, September and December) to bank account below.

Defer until maturity.

Bank  Branch  Account Name

Bank Branch Account Suffix

## PAYING YOUR INVESTMENT AMOUNT Please select one of the following options for transferring your investment amount to Heartland.

Cheque (enclosed)  Direct Credit - Bank account for Heartland Deposits: ANZ 01-0194-0127500-02

## IDENTIFICATION REQUIREMENTS

The Financial Transactions Reporting Act 1996 requires the identity of all new investors to be verified. The following identification is required and Heartland Building Society reserves the right to seek additional information.

### Individual/Joint investors

- Bank account identification such as a pre-printed deposit slip, cheque or bank statement in the name of the investor(s); AND
- Personal identification such as a copy of the investor(s) passport or driver licence.

### Company/Incorporated Society/Partnership/Trust

- Bank account identification such as a pre-printed deposit slip, cheque or bank statement in the name of the organisation; AND
- Personal identification such as a copy of passport or driver licence for all directors/executives/partners/individual trustees (as applicable); AND
- A copy of the certificate of incorporation, partnership agreement or trust deed (as applicable).

### Any Other Organisation

- Bank account identification such as a pre-printed deposit slip, cheque or bank statement in the name of the organisation; AND
- Personal identification such as a copy of passport or driver licence for all signatories; AND
- A copy of the minutes authorising the signatories and providing sample signatures.

## SIGNATURES

Date / /

Date / /

- Notes
- Joint applications must be signed by all applicants.
  - If the application is signed by an attorney, please attach a copy of the power of attorney. By signing, the attorney declares that they have not been notified of the death of the donor or of the revocation of the power of attorney.

## ADVISER/BROKER DETAILS

Do you have an Adviser/Broker?  Yes  No If Yes: My Adviser/Broker for this investment is:

OFFICE USE

Ref No.

Date / /

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PLEASE TAPE HERE BUT DO NOT SEAL PAST THE LINE.

PLEASE TAPE HERE BUT DO NOT SEAL PAST THE LINE.

(FOLD HERE)

(PLEASE SEAL ON ALL OPEN SIDES AND RETURN FREEPOST)

(FOLD HERE)

Heartland Deposits  
PO Box 9919  
Newmarket  
Auckland 1149

FreePost Authority Number 4040

**HEARTLAND**  
Building Society

