

# JMI Wealth KiwiSaver contribution form

Complete this form to **change** the level of your contributions to the JMI Wealth KiwiSaver Scheme. If you are currently not contributing through your employer, you may also need to complete an IRD KS2 form and give it to your employer.

JKS21 – 22.03.2024

## Your details

IRD number:    -    -    (You must enter your IRD number)

Name:

Date of birth:  (dd/mm/yyyy)

Phone: (  )

Home address:

Town/city:

Post code:

Email:

Employer:

## Your Savings Level

### Regular savings

If you are an employee, you can save either 3%, 4%, 6%, 8% or 10% of your before-tax pay by deduction from your pay. The default level is 3% and at or above this level, your employer must contribute 3% (less tax) as employer contributions. You must request this directly of your HR/payroll team by completing an IRD KS2 form.

### Lump sum savings

You may also make payments direct to the JMI Wealth KiwiSaver Scheme at any time. There are no minimum or maximum amounts.

I wish to contribute a lump sum of \$

I have made this payment directly into the **JMI Wealth KiwiSaver Scheme** bank account on  (dd/mm/yyyy)

Bank ASB  
Branch Auckland North Wharf  
Number 12-3244-0021856-00  
Include your name and IRD number on the bank reference

## Your investment strategy

Your future contributions will be invested in the same way contributions to your KiwiSaver account are currently invested. You can change your investment options at any time. If you wish to change your investment strategy you should also complete an investment option change form, or change it online by logging in at [www.jmiwealthkiwisaver.co.nz](http://www.jmiwealthkiwisaver.co.nz)

## Signature

Your signature: \_\_\_\_\_ Date: \_\_\_\_\_ (dd/mm/yyyy)

Note: Unless you advise otherwise, communication material, where appropriate, is provided by the JMI Wealth KiwiSaver Scheme via email to ensure timely delivery of service.

## Government contributions

1. If you are 18 or older and under the KiwiSaver retirement age, the government contributes to your KiwiSaver savings, \$1 for each \$2 you save, up to \$521.43 a year. This is known as a government contribution. This is based on a 1 July to 30 June year and is normally paid in July. Therefore, most KiwiSaver members should contribute at least \$1042.86 per year to receive the maximum government contribution.
2. You need to be a resident in New Zealand to receive the government contribution, but you do not need to be resident to make a lump sum contribution.