

PREFERRED PROVIDER APPLICATION (for employers)



» PREFERRED PROVIDER APPLICATION FORM (FOR EMPLOYERS)

This form confirms your selection of the CareSaver KiwiSaver Scheme as your preferred Scheme for your employees

TO: Pathfinder Asset Management Limited (**Pathfinder** or **us**) as issuer and manager of the CareSaver KiwiSaver Scheme (**Scheme**).

FROM: (please insert your company's full name) (the **Employer** or **you**)

Please provide the required details and see **Terms of Agreement** at the bottom of the page:

» EMPLOYER DETAILS

EMPLOYER'S IRD NUMBER

NUMBER OF EMPLOYEES

EMPLOYER'S PHYSICAL ADDRESS

CITY

POSTCODE

EMPLOYER'S POSTAL ADDRESS *(if different from above)*

CITY

POSTCODE

NAME OF CONTACT PERSON

POSITION OF CONTACT PERSON

EMAIL

PHONE NUMBER

The Employer authorises Pathfinder to pass on the above information to the Commissioner of Inland Revenue on your behalf

SIGNED BY THE EMPLOYER

PLEASE PRINT NAME OF SIGNATORY

DATE (dd/mm/yyyy)

» TERMS OF AGREEMENT

1. Appointment as preferred KiwiSaver: You select the Scheme as your chosen KiwiSaver scheme for your employees for the purposes of section 47 of the KiwiSaver Act 2006. This selection will apply to your employees who (1) are automatically enrolled into KiwiSaver and (2) choose to opt in to KiwiSaver and don't actively select their own KiwiSaver Scheme. Any employees who do not select a specific fund will automatically have their contributions invested in the CareSaver Conservative Fund
2. Not mandatory: Please note that selecting the Scheme as your preferred KiwiSaver provider does not automatically enrol your existing employees into the Scheme. All employees continue to have the right to choose which KiwiSaver Scheme they wish.
3. Notification to Inland Revenue: You authorise us to notify the Commissioner of Inland Revenue that the Scheme is your chosen KiwiSaver Scheme for the purposes of sections 46-49 of the KiwiSaver Act 2006. Your selection of the Scheme will be effective from the date that notice is accepted by the Inland Revenue. The Scheme will remain your chosen KiwiSaver scheme as an employer until written cancellation of this appointment is received by us and the Inland Revenue.
4. Compliance with laws: You agree to comply with your obligations under KiwiSaver legislation with respect to the Scheme. This includes providing a copy of the Scheme's Product Disclosure Statement to an employee before they join the Scheme.