

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 – 12.11.2025

Your details

IRD number:

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(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. From 1 April 2026, the default contribution rate will go to 3.5% and then from 1 April 2028, to 4%. Your employer is also required to match these new rates. For this transitional period, you will temporarily be able to opt down to the 3% rate, but will only receive employer contributions at that rate. 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 \$ _____

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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

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 16 or older and under the KiwiSaver retirement age, the government contributes to your KiwiSaver savings, 25 cents for each \$1 you contribute, up to \$260.72 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 and have an income of \$180,000 or less for the year to receive the government contribution, but you do not need to be resident to make a lump sum contribution.