JMI Wealth KiwiSaver Scheme

Reset Form

Direct debit authority form

June 2025

To set up a recurring direct debit from your bank account to Smart, complete this form and email it to **contact@myjmiwealthkiwisaver.co.nz** or post it to PO Box 105262, Auckland 1143.

Personal and contribution details

Member name: _____

Member IRD number: _____

Direct debit start date (required): _____

Direct debit amount $: _____

Frequency: (Tick one) ☐ Weekly ☐ Fortnightly ☐ Monthly

Instructions: (Tick one)

☐ Set up a direct debit

☐ Change the bank account an existing direct debit is paid from

☐ Change the amount and/or frequency of an existing direct debit

Direct debit authority

Bank account details

Name of bank: _____ Name of bank account holder: _____

Bank account number from which payments are to be made:

Bank		Branch				Account number							Suffix			

(Please attach a deposit slip or bank statement to ensure your number is loaded correctly)

Information to appear on bank statement

Payer particulars:	J	M	I		W	E	A	L	T	H						
Payer code:																
Payer reference:	K	I	W	I	S	A	V	E	R							

Approved: 2919

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Authorisation Code

1229194

Authorisation

I/We authorise you to debit my/our account with the amounts of direct debits from Smart (the initiator) with the authorisation code specified on this authority in accordance with this authority until further notice. I/We agree that this authority is subject to the bank's terms and conditions that relate to my/our account, and the specific terms and conditions set out over the page.

Account holder signature(s): _____ Date: _____

Specific terms and conditions

You may ask your bank to reverse a direct debit up to 120 calendar days after the debit if you don't receive written notice of the amount and date of each direct debit from the initiator, or you receive written notice but the amount or the date of debiting is different from the amount or the date specified on the notice.

The initiator is required to give you written notice of the amount and date of each direct debit in a series of direct debits no later than the date of the first direct debit in the series. The notice is to include the dates of the debits and the amount of each direct debit.

If the bank dishonours a direct debit but the initiator sends the direct debit again within five business days of the dishonour, the initiator is not required to give you a second notice of the amount and date of the direct debit.