

Application for Xceda Savings Account

Full name, IRD number and contact details

Primary Investor

Full name	IRD Number	-	-
Phone ()	Email	DOB	/ /

Joint Investor (if applicable)

Full name	IRD Number	-	-
Phone ()	Email	DOB	/ /

Company or Trust (if applicable)

Full name	IRD Number	-	-
Phone ()	Email		

Address Details

Physical address	
Town/City	Postcode
Postal address (if different to physical)	

Tax Details

Withholding tax

If you do not supply your IRD number, we are required to deduct RWT at 45% (unless NRWT or AIL applies)

Resident Withholding Tax (RWT): 10.5% 17.5% 30% 33% 39% RWT Exempt

Non-Resident Withholding Tax (NRWT): 10% 15% **Company Tax:** 28% **Approved Issuer Levy(AIL)**

PRIMARY APPLICANT ONLY

Are you a tax resident of any country other than New Zealand? Yes No

If yes, country of tax residence?

Are you a US citizen or a reporting entity for the purposes of FATCA? Yes No

JOINT APPLICANT ONLY (IF APPLICABLE)

Are you a tax resident of any country other than New Zealand? Yes No

If yes, country of tax residence?

Are you a US citizen or a reporting entity for the purposes of FATCA? Yes No

Bank account details

Please attach a bank statement or confirmation showing your name and bank account number.

Bank	Branch		
Bank	Branch	Account Number	Suffix

Savings Goals

Whether you're saving for a home, a holiday, or something else, we need to know more about your savings goals and how you plan to use your Xceda Savings account. This helps us meet our Anti-Money Laundering obligations and ensure your account is set up correctly.

What are your savings goals? e.g. Retirement

Where will your savings come from? E.g. Salary or wages

How often do you intend to use your account? E.g. Weekly

How much do you expect your average transaction to be?

How did you hear about Xceda?

Statements

How do you wish your statements to be sent? Email Post (paper)

Signatures

Having received and read and Product Disclosure Statement of Xceda Finance Limited dated 07th September 2023 (as supplemented from time to time), I/we hereby:

- Apply for an Xceda Savings Account as set out above upon the terms and conditions of the Trust Deed and the Product Disclosure Statement;
- Agree to provide Xceda Finance with all requested due diligence information that is required to satisfy applicable laws, such as the customer due diligence obligations under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009;
- Acknowledge that any personal information in this application form may be used by Xceda Finance to consider and process my application, to administer my investment, to help enable Xceda Finance to comply with applicable laws, rules and regulations, and to provide me with information about our promotions and products. Investors that are individuals under the Privacy Act 2020 have the right to access and correct any personal information held by Xceda Finance.
- I agree to promptly provide updated information to Xceda Finance if my circumstances change or if the information in this form becomes incorrect. I acknowledge that Xceda Finance may have to share the information in this form with Inland Revenue, who may share the information with tax authorities of the countries of which I am or may be tax resident. I confirm that the above declaration extends to any other information that I may provide to Xceda Finance after signing this form.

<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	Signature	Date

If signed under power of attorney the attorney hereby declares that they have not had notice of the death of the donor or the revocation of the power of attorney.

DISCLAIMER

Xceda Finance Limited is a Non-Bank Deposit Taker regulated by the Reserve Bank of New Zealand licensed under the Non-Bank Deposit Takers Act 2013, regulated by the Reserve Bank of New Zealand.

Xceda Finance Limited is the issuer of the deposit accounts. Our latest Product Disclosure Statement is available at: www.companiesoffice.govt.nz/disclose

The creditworthiness of Xceda Finance Limited has been rated by Equifax Australia Credit Ratings Pty Ltd, a ratings agency approved by the Reserve Bank under section 86 of the Non-bank Deposit Takers Act 2013.