

1 September 2026

Please email this form and any supporting documentation to:
mas@invest.mas.co.nz

You can also post your documents to:
MAS
FREEPOST 884
PO Box 91976
Victoria Street West, Auckland 1142

For assistance:
Phone 0800 627 738

i Important information

Complete this form to supplement the application form for trusts and other entity accounts for MAS Investment Funds.

If you wish to change the ownership structure of your existing MAS Investment Funds account and/or authorised signatories please contact us.

1. Entity details

Entity name

2. Your details

What is your role or relationship to the entity: (i.e. Trustee, Director, Officer)

Full name

Date of birth

Occupation

Email address

Phone number

Physical address (not a PO Box number)

Postal address (if different from physical address)

Are you a tax resident of one or more countries other than New Zealand?

Yes (please complete the table below)

No

If yes, please list below all countries, other than New Zealand, in which you are a tax resident and provide the Tax Identification Number (TIN) for each country, or equivalent. Or provide a reason if you are unable to provide a TIN.

Country of tax residence	Tax Identification Number (TIN)

Investor Identification

We have two options for investors to confirm their identity. Please select one of the options below.

Option 1: Electronic Identity Verification:

MAS has the ability to electronically verify your identity. Once we have received your application, we will send you an email via GBG Cloudcheck our third-party partner to verify your identity.

To electronically verify your identity you will need a valid New Zealand Passport or New Zealand Driver Licence.

If you do not have New Zealand identity documents, you will need to go to Option 2.

Option 2: Certify or Verify Identity Document

For further detail on the document requirements, including who can certify them and correct certification wording, please refer to the **Identification Requirements** section on the relevant entity application form.

3. Declaration

- I acknowledge that I have read the MAS Investment Funds Product Disclosure Statement (PDS) and agree to be bound by the terms and conditions of the PDS.
- I acknowledge that I have read and agree to the Terms and Conditions set out in the entity application form.

Name of authorised person
(Trustee, Director, Officer)

Signature

Date

dd-mm-yyyy