

Personal details

 Mr Mrs Ms Miss Other

Name

First name Last name

Address

Street address Suburb Town/City Postcode Country Phone

Email address

By providing this email address and/or mobile telephone number, you consent to BNZ contacting you electronically (e.g. by email, text, website link) from time to time with information about our products, services, and promotions, and without an unsubscribe facility.

Date of birth

Gender

 Male Female

Marital status

 Married/living with partner
 Single Divorced Separated Widowed
Number of dependents (i.e. children)

Employment status

 Full time Part time Self employed Student
 Retired Homemaker Other
Current employer

Years at current employer

 < 6 months 6 months - 2 years 2 years - 4 years > 4 years
Existing bank

Residential type

 Own home Rent Board Live with parents/family
 Other

Income and expenditure

Existing bank Annual income (before tax)

(Please confirm amounts per annum)

\$

Other income

\$

Rent/mortgage repayments

(Please confirm amounts per month)

\$

Childcare & Education

\$

Household

(Sports, food, clothing)

\$

Other debt payments

(Student, car loan etc)

\$

Other living expenses

(Utilities, rates, insurance, super)

\$

IRD number Tax rate

Exempt/10.5%/17.5%/28%/30%/33%

Do you have tax arrears? No Yes

Property information

Primary property (house and land)

Street address Suburb Town/City Postcode Latest valuation

\$

Amount of mortgage

\$

Maturity date

Property mortgaged to

Your financial position

Liabilities

Amount

Overdraft

\$

Home loan (as above)

\$

Home loan lender 2

\$

Car loan

\$

Other loans

\$

Overdraft

Limit

Credit cards

Limit

Total liabilities

\$

Assets

Amount

Bank account

Name of lender

\$

Other accounts

\$

Life insurance cover

\$

Surrender value (if applicable)

\$

Primary property (as above)

\$

Other properties

\$

Motor vehicles

\$

Other assets or investments (inc. net Trust position)

\$

Total assets

\$

Less: Total liabilities

\$

Equals: Total equity

\$

Personal information

This notice relates to information about you which you are now providing to Bank of New Zealand and/or its related companies (as defined in section 2(3) of the Companies Act 1993 as if 'company' includes a company or other body corporate incorporated in New Zealand or any other jurisdiction) (each a BNZ Company) or which the BNZ Companies may hold now or in the future.

1. The BNZ Companies will ensure that the information about you is held securely and will not disclose the information to any other person, except for the purposes described below or as authorised by you or when required or authorised by law.
2. The Privacy Act 1993 gives you the right to see and correct information.
3. This information will be used primarily to further the relationship between you and the BNZ Companies including offering or providing any products or services to you. The information may also be disclosed to any person who gives a guarantee and /or security in respect of your obligations to the BNZ Companies.
4. You agree that the BNZ Companies can collect information from you and use that information to help the BNZ Companies comply with any laws, rules or regulations in New Zealand or overseas. You agree to supply any information requested by the BNZ Companies to help BNZ, or any other BNZ Company, comply with any such laws, rules or regulations in New Zealand or overseas. You also agree that any BNZ Company can share any information about you and your accounts with any government body or agency in New Zealand or overseas (including any tax authorities) to help the BNZ Company comply with any laws, rules or regulations in New Zealand or overseas.
5. The collection of certain information from you is required by the Anti-Money Laundering and Countering Financing of Terrorism Act 2009. In certain circumstances information may be released by the BNZ Companies to third parties in accordance with the Act.
6. To seek your views on services and/or products, the BNZ Companies may provide your details to market research organisations. If you do not wish your details to be provided please tick this box.
7. In respect of opening and reviewing accounts, applications and offering you relevant products and services, you authorise the BNZ Companies to make credit reference checks and other enquiries within their normal procedures. For this purpose, the BNZ Companies may seek information about you from any source. If you authorise the collection and disclosure of all information relevant to your accounts from/to any credit reporting agency, credit reporting agencies may use information disclosed by the BNZ Company to update their credit reporting database, and disclose any information that they hold about you to their own customers as permitted under the Credit Reporting Privacy Code. In addition the BNZ Companies may use any service provided by its credit reporting agencies to receive updates of the information it holds about you. If you are in default under any loan or facility from a BNZ Company, the BNZ Companies are authorised to disclose all relevant information about you to, and for the use by, credit reporting agencies, debt collection agencies and law firms.
8. If you do not wish to provide all the information requested, then please tell us and the officer dealing with you will explain the possible consequences.

Identification document and proof of address

All signatories to accounts must provide photo identification and proof of address that are acceptable to the BNZ Companies as requirements of the Code of Banking Practice and the Anti-Money Laundering and Countering Financing of Terrorism Act 2009. Some examples of acceptable identification include New Zealand/overseas passport, New Zealand certificate of identity, New Zealand firearms licence. Proof of address includes a recent bill from the company who supplies your power, gas, water, phone or internet services, a statement from any New Zealand bank, Council rates notice, insurance policy, a letter from the Electoral Office, anything from a government agency that includes your name, address.

Country of Citizenship

Are you a citizen of another country?

Yes No

(Please list all your other countries of citizenship below)

Are you a tax resident of another country (other than NZ)?

Yes No

(Please list all your other countries of tax residency below)

Country

Tax Number

Declaration

I/We certify that all the information supplied now or hereafter is true and complete.

I/We believe that I/we can afford to service the credit applied for.

I/We hereby authorise the BNZ Companies to make any enquiries the BNZ Companies consider necessary for confirmation of the above.

I/We confirm that we have read and agree to the personal information notice above.

First name

Last name

Signature

D | D | M | M | Y | Y