Schedule 7 - Investor & Other Information

Entity Name: _____

1) Income Did you receive any income from paid wages / superannuation? Yes No 2) Rebate Information Please provide receipts for Donations made Yes No 3) Other Income Pues, the IRD will send us your Summary of Earnings automatically. Yes No 3) Other Income Did you receive any other income, for example from estates or trusts, annuity / pensions ? Yes No 3) Other Income Source / Type of Income Gross Tax Paid				
Please provide receipts for Donations made Yes No 3) Other Income Did you receive any other income, for example from estates or trusts, annuity / pensions? If yes, attach a copy of supporting documentation Yes No Person Receiving Income Source / Type of Income Gross Tax Paid	1)	Did you receive any income from paid wages / superannuation?	Yes	No
Did you receive any other income, for example from estates or trusts, annuity / pensions ? Yes No Person Receiving Income Source / Type of Income Gross Tax Paid	2)		Yes	No
4) Portfolio Summary Reports \$	3)	Did you receive any other income, for example from estates or trusts, annuity / pensions ?	Yes	No
4) Portfolio Summary Reports Do you use an investment manager or advisor? If yes, please provide a copy of any portfolio summary reports received in respect of the year. Yes No 5) New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income Did you receive any income from these sources? If yes, please provide advice notices Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding: • Name of the Company and the number of shares held • Market Value of these Shares as at 31 March 2022 • Details and documentation of al sales & purchases • Details of share reinvestments Do you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? If yes, please provide details Yes No 7) Rental Income (including Air B & B) Did you receive any rental income? If yes, please attach a copy of the invoice. Yes No 8) Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. Yes No 9) Kiwi Saver Do you bave for to Kiwi Saver? If yes, Name of Provider Yes No		Person Receiving Income Source / Type of Income Gross Tax Paid		
4) Portfolio Summary Reports Do you use an investment manager or advisor? If yes, please provide a copy of any portfolio summary reports received in respect of the year. Yes No 5) New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income Did you receive any income from these sources? If yes, please provide advice notices Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding: Name of the Company and the number of shares held Market Value of these Shares as at 31 March 2022 Details of share reinvestments Do you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? If yes, please provide details Yes No 7) Rental Income (including Air B & B) Did you receive any rental income? (IF YES, COMPLETE SCHEDULE 1) Yes No 8) Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. 9) Kiwi Saver Do you baye Income Protection Insurance? If yes, Name of Provider Yes Yes No		\$\$		
4) Portfolio Summary Reports Do you use an investment manager or advisor? If yes, please provide a copy of any portfolio summary reports received in respect of the year. Yes No 5) New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income Did you receive any income from these sources? If yes, please provide advice notices Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding: Name of the Company and the number of shares held Market Value of these Shares as at 31 March 2022 Details of share reinvestments Do you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? If yes, please provide details Yes No 7) Rental Income (including Air B & B) Did you receive any rental income? If yes, please attach a copy of the invoice. 8) Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. 9) Kiwi Saver Do you being to Kiwi Saver? If yes, Name of Provider Please provide a copy of your end of year tax statement to check that the tax rate being		\$\$		
Do you use an investment manager or advisor? Yes No If yes, please provide a copy of any portfolio summary reports received in respect of the year. Yes No 5) New Zealand - Interest / Dividends / Portfolio Investment Entities (PIE) Income Did you receive any income from these sources? Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Did you receive any income from these sources? Yes No 7) Name of the Company and the number of shares held Yes No 7) Rental Income (including Air B & B) Did you receive any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? Yes No 8) Income Protection Insurance (IF YES, COMPLETE SCHEDULE 1) Yes No 8) Income Protection Insurance? Yes No 9) Kiwi Saver Yes No 9) Kiwi Saver Yes Yes No 9) </td <td></td> <td>\$\$</td> <td></td> <td></td>		\$\$		
Did you receive any income from these sources? Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Overseas - Interest / Dividends / Other Income / Pensions / Superannuation Yes No 6) Market Value of these Shares as at 31 March 2022 No Yes No 9) Market Value of these Shares as at 31 March 2022 Pension fund or super scheme? Yes No 7) Rental Income (including Air B & B) Yes No No 7) Rental Income (including Air B & B) Yes No 8) Income Protection Insurance Yes No 9) Kiwi Sa	4)	Do you use an investment manager or advisor? If yes, please provide a copy of any portfolio summary reports received in respect of the	Yes	No
Did you receive any income from these sources? Yes No If yes, please provide income distribution details We also require the following information for each shareholding: Yes No • Name of the Company and the number of shares held • Market Value of these Shares as at 31 March 2022 Petails and documentation of all sales & purchases Yes No • Details and documentation of all sales & purchases • Details of share reinvestments Yes No To you have any interest in a foreign company, unit trust, life insurance policy, pension fund or super scheme? Yes No T/ Rental Income (including Air B & B) (IF YES, COMPLETE SCHEDULE 1) Yes No 8) Income Protection Insurance Yes No No 9) Kiwi Saver Yes, Name of Provider Yes No Please provide a copy of your end of year tax statement to check that the tax rate being Yes No	5)	Did you receive any income from these sources?	Yes	No
pension fund or super scheme? Yes No If yes, please provide details Yes No 7) Rental Income (including Air B & B) Did you receive any rental income? (IF YES, COMPLETE SCHEDULE 1) Yes No 8) Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. Yes No 9) Kiwi Saver Do you belong to Kiwi Saver? If yes, Name of Provider Please provide a copy of your end of year tax statement to check that the tax rate being Yes No	6)	 Did you receive any income from these sources? If yes, please provide income distribution details We also require the following information for each shareholding: Name of the Company and the number of shares held Market Value of these Shares as at 31 March 2022 Details and documentation of all sales & purchases Details of share reinvestments 	Yes	No
Did you receive any rental income? (IF YES, COMPLETE SCHEDULE 1) Yes No 8) Income Protection Insurance Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. Yes No 9) Kiwi Saver Do you belong to Kiwi Saver? If yes, Name of Provider Please provide a copy of your end of year tax statement to check that the tax rate being Yes No		pension fund or super scheme?	Yes	No
Do you have Income Protection Insurance? If yes, please attach a copy of the invoice. Yes No 9) Kiwi Saver Do you belong to Kiwi Saver? If yes, Name of Provider Please provide a copy of your end of year tax statement to check that the tax rate being Yes No	7)		Yes	No
Do you belong to Kiwi Saver? Yes No If yes, Name of Provider	8)	Do you have Income Protection Insurance?	Yes	No
	9)	Do you belong to Kiwi Saver?	Yes	No