

**OTAMA MARERE (PAENGAROA A5) TRUST**  
**REGISTRATION AND UPDATE FORM**

DATE: \_\_\_\_\_

Share holder number: \_\_\_\_\_

**Personal information and Identification for owners and Trustees of Whanau Trusts**

Title (please circle)	Mr/Mrs/Miss/Other
Surname	
Given first name	
Postal address	
Email address	
Phone	
Date of Birth	
IRD Number (if the owner is a whanau Trust then you do not need to complete)	
Whakapapa – Father’s name	
Whakapapa – Mother’s name	
Whakapapa – Sibling’s name/s	
Photographic Identification: Please provide a one of the following:	Copy of Drivers Licence (we need a copy of the front AND back of the licence) OR OR Copy of Firearms Licence Or Copy of Passport
Or if you do not have photo identification, then please provide two of the following:	Copy of Birth Certificate /Copy of Community Services card /Copy Bank card with name embossed and signature (Front and back)

**Whanau Trust information – If the owner is a whanau Trust then please complete the following:**

Full name of whanau trust	
IRD Number for whanau trust	
Postal Address for Whanau Trust	

**VERIFICATION OF BANK ACCOUNT DETAILS**

	<b>New Zealand bank account details</b>	Affix bank stamp here
Full name of bank		
Full branch address		
Bank account number		
Account name		

Please attach one of the following options to this form to verify your bank details:

- An original bank coded deposit slip; or
- An original or copy of your bank statement; which is stamped and verified by your bank
- Bank stamped this update form.

**Please note we are unable to make any payments to a third party bank account.**

## **IMPORTANT INFORMATION**

**PLEASE NOTE:** We require the original form to be returned to us. You can do this by:

- Dropping the form at your local Perpetual Guardian Office; or
- By post: Perpetual Guardian, PO Box 1040, Rotorua 3040

### **RECENT SUCCESSIONS/ FIRST TIME REGISTRATIONS**

- In order to be noted on our system as an owner, we require notice of your succession. If you have not received correspondence from our office previously, we may not have updated your succession on our system and ask that you please provide a copy of the Māori Land Court Order showing original owner, new owner(s) and schedule of lands that have been transferred.

### **WHANAU TRUSTS**

- If shares have been vested into a Whanau Trust then we ask for a copy of the Māori Land Court Order constituting the Whanau Trust (if applicable) showing Trustees' names, and Order Vesting Shares in Trustees of the Whanau Trust with schedule of lands that have been transferred.
- If there is Change of Trustees please provide a copy of the Māori Land Court Order showing the change of Trustees so we may reconcile to Māori Land Court records.

### **NAME CHANGE**

- Should your name change, need alteration, or correction, we require a copy of the Māori Land Court Order confirming that the change of name has been processed prior to updating our records.

### **PRIVACY ACT 1993 DISCLOSURE**

Please note the following:

- This form collects personal information about you for the purposes of registering your details so you can receive newsletters, notices and any benefits relating to your shares in this Trust.
- The intended recipients of this information are Perpetual Guardian, their employees and the Trustees/Administrators of the blocks which Perpetual Guardian Administers and in which you are an owner.
- The information is being collected and held by Perpetual Guardian. At times, your information may be shared with the Trustees or chosen administrators for the Trust.
- Failure to provide the requested information in this form may result in your registration being limited. For example, if you do not provide photo identification and bank account details then no payments can be made to you from the Trusts in which you are an owner.
- You have the right of access to, and correction of, information held about you subject to the provisions of the Privacy Act 1993.

**Any registration queries, please contact us:**

Otama Marere Trust

C/-Perpetual Guardian

**Office:** Perpetual Guardian, 1130 Pukaki Street Rotorua

**Postal:** PO Box 1140, Rotorua 3040

**Telephone:** (07) 921 7680

**Email:** [kotuia@pgtrust.co.nz](mailto:kotuia@pgtrust.co.nz)