

Fidelity Life has made some changes to our statements for the tax year ending 31 March 2021. This is to ensure we continue to comply with the requirements of the IRD.

As part of this change, we've updated the name of the document from "Tax invoice" to "Tax statement" and our GST number has been removed.

The purpose of our customer **income tax statements**, which are issued every April, is to provide you an easy breakdown of your premiums paid during the previous tax year (1 April to 31 March). This can help when you're preparing your income tax returns, in conjunction with your tax adviser, to determine how much (if any) of your premiums paid during the previous tax year are deductible for income tax purposes.

The statements are only applicable to the following product types:

- Indemnity Income protection
- Disability income
- Defined disability income
- Key person
- Optimal cover
- Rural disability income
- Business disability
- Business overheads
- Business expenses

Please note, premiums for Agreed value products aren't included in the tax statements.

It's up to you and your tax adviser to determine whether any of the premiums paid to Fidelity Life for any of your policies are deductible for tax purposes – Fidelity Life isn't able to provide tax advice

If you're **GST registered** and require a **Tax invoice** to support a GST return, please contact us via taxinvoicerequests@fidelitylife.co.nz or call us on 0800 88 22 88 to arrange for an invoice to be issued.