

Application for withdrawal - Retirement

Use this form to apply for a retirement withdrawal from the NZ Funds KiwiSaver Scheme. You can make a retirement withdrawal when you have reached the age of entitlement for New Zealand Superannuation (currently 65) and you have been a member of a KiwiSaver scheme for at least 5 years.

We may also require you to complete an identity verification form, *AML Form for an Individual (Form 1)*, which is available on our website www.nzfunds.co.nz (please see the Checklist at the end of this form for more details).

Complete and return to: Freepost NZ Funds KiwiSaver Scheme, Private Bag 92050, Auckland 1142, or email: nzfkivi@linkmarketservices.com

Please print in BLOCK letters and complete all fields unless not applicable.

Section A: Your personal details

Member number

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IRD number

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Name

Title (Mr / Mrs / Miss / Ms / Dr)

Given Name(s)

Surname

Address

Street/PO Box

Suburb

City

Postcode

Contact phone number(s)

Mobile

Home

Business

Section B: Withdrawal request

I would like to make a (please tick):

<input type="radio"/> Regular withdrawal (minimum \$100)	Amount \$ <input type="text"/>	<input type="radio"/> Weekly*	<input type="radio"/> Fortnightly*	<input type="radio"/> Monthly*
<input type="radio"/> Partial withdrawal (minimum \$500)	Amount \$ <input type="text"/>			
<input type="radio"/> Full withdrawal of all available funds**				

All partial withdrawals will be deducted proportionately across each Strategy you are invested in.

* Weekly and fortnightly withdrawals will be paid on a Tuesday. Monthly withdrawals will be paid on the 15th of each month or the prior working day if this falls on a weekend or public holiday.

** Please allow up to one month for this process to take place as we have to make a final member tax credit claim from Inland Revenue.

Section C: Payment details

Any withdrawal payments will only be paid to a New Zealand bank account in your name (held individually or jointly).

Please provide proof of your bank account in the form of a pre-encoded bank deposit slip or a copy of a bank statement.

Account name

Bank

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Branch

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Account number

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Suffix

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Continued over...

Section D: Acknowledgement

- I understand that the information provided in connection with this form will be used by the Manager, the Administration Manager and the Trustee (including their related entities) to process my withdrawal request and to administer my membership of the NZ Funds KiwiSaver Scheme (and may be disclosed for these purposes to third parties where relevant, including my authorised financial adviser, Inland Revenue, or other government agency). I acknowledge I have the right to access and correct this information subject to the provisions of the Privacy Act 1993.
- I understand that where my principal place of residence has not been New Zealand, I am not entitled to member tax credits during that period. Any member tax credits claimed by the Manager on my behalf during that period will be deducted from my withdrawal amount and returned to Inland Revenue.
- I understand that my withdrawal value might fluctuate and will be based on the unit price(s) applying at the date when my withdrawal request is processed and will be adjusted for any tax liability, fees and expenses.
- I acknowledge that on payment of the withdrawal amount to the bank account specified in this form, I will have no further claim against the NZ Funds KiwiSaver Scheme in relation to such payment.
- I acknowledge that if I withdraw my total NZ Funds KiwiSaver Scheme account balance, my membership in the NZ Funds KiwiSaver Scheme will end and I cannot re-open or establish a new KiwiSaver account with the NZ Funds KiwiSaver Scheme or another KiwiSaver scheme. I agree to release all claims that have been made or may be made by me against the Manager and/or the Trustee in relation to the NZ Funds KiwiSaver Scheme.
- I confirm that all information provided in (or in connection with) this application is true and correct.

Signature of member

Date

Section E: Your statutory declaration

Please complete this section if this is your first retirement withdrawal from the NZ Funds KiwiSaver Scheme. If you have transferred funds to the NZ Funds KiwiSaver Scheme from an Australian superannuation scheme (Australian sourced retirement savings) and wish to withdraw some or all of these funds, please also complete the relevant box below.

I solemnly and sincerely declare that:

I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver.

I was living overseas for the following dates:

to

and I understand I do not qualify to be paid the member tax credit for this period.

I would like to withdraw some or all of my Australian sourced retirement savings and solemnly and sincerely declare that:

I am aged 60 or over, am retired, and I do not intend to be gainfully employed again on either a full-time or part-time basis.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Signature of member

Date

Declared at

Before me (Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration under the Oaths and Declarations Act 1957)

Name

Signature

Occupation

Insert stamp here

Continued over...

Checklist

- I have: completed Sections A, B, C and D
- signed and dated Section E (i.e. the Statutory Declaration), if relevant, and
- had Section E duly authorised

- I attach: a bank deposit slip or bank statement showing the account name and number for payment of the requested withdrawal
- an AML Form for an Individual (Form 1), along with the appropriate identification and proof of address documentation

NOTE: if you have already previously completed an AML Form and provided the required AML documentation, then please just provide a copy of photo ID (e.g. driver licence, passport)