

Australian Superannuation Retirement Withdrawal

If you would like help in completing this form, please email enquiries@fisherfunds.co.nz or phone us on **0508 347 437**.

You can complete this form on-screen by typing directly into each field. Once you have completed this form, please email this form along with any supporting documents to enquiries@fisherfunds.co.nz from your registered email address or post your completed application to **Fisher Funds KiwiSaver Plan, Private Bag 93502, Takapuna, Auckland 0622**.

Who should complete this form?

Please use this form to apply for a retirement withdrawal of your Australian sourced retirement savings from your Fisher Funds KiwiSaver Plan ("KiwiSaver account").

You can withdraw your Australian superannuation funds from your KiwiSaver account when you meet the following criteria:

- You have reached the age of 60; and
- Have retired at the date of the withdrawal request.

For the purposes of assessing your eligibility to withdraw your Australian superannuation funds, retirement is defined in Australian regulations as a person who has reached the age of 60 and intends to never again become gainfully employed, either on a full time or part time basis. If you meet the criteria, you will be able to withdrawal the amount received from your Australian superannuation scheme (this excludes any positive or negative returns.)

You can withdraw the remaining funds in your KiwiSaver account once you've reached the age of 65.

This withdrawal application will be processed once all requirements have been received and you have reached the age of 60.

Section 1 — Your details

Title	First name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Address

City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Home phone	Business phone	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email address

KiwiSaver account number	IRD number	Date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>

Prescribed Investor Rate (PIR) — *please tick one*

10.5%
 17.5%
 28%

To work out your PIR, or for more information, visit fisherfunds.co.nz/pircalculator

If your selected PIR differs to the rate we have on file, the change will require one business day to update before your withdrawal can be processed. If you do not select a PIR, your withdrawal will be processed at the rate we hold on file for this account.

Section 2 – Identification options

Your withdrawal request must be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

Option 1

Electronic identity verification

Fisher Funds has the ability to electronically verify your identity and address. Once we have received your application we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification you must have: a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following: New Zealand Passport; New Zealand Drivers Licence; Australian Passport; Australian Drivers Licence.

If this method of identification is unsuccessful you will be required to provide certified ID and proof of address.

Option 2

Certified copies of identity documents and proof of residential address

Please provide a certified copy of your identity documents and proof of your residential address. Refer to sections 3 and 4 for information on acceptable identity documents and who can certify them.

Preferred identification method – please select one of the following options:

Option 1 – I would like Fisher Funds to electronically verify my identity

Option 2 - I would like to provide Fisher Funds with certified copies of my identity documents

Section 3 – Certified identity documents

If you selected Option 2 as your preferred way for us to verify your identity please select one of the certified identification options below. If you have selected Option 1 you do not need to provide certified ID now.

Option A: (preferred)

- Passport**
(containing name, date of birth, photograph and signature)
- OR
- New Zealand Firearms Licence**
- OR
- New Zealand Driver Licence**
(front and back)

Option B:


- Full Birth Certificate**
AND one of the following
- 18+ Card/Kiwi Access Card**
- OR
- Overseas Drivers Licence**

* If you are supplying foreign identity documents you must also supply proof of New Zealand residency to enable us to confirm your eligibility to join/have KiwiSaver.

Your photo identification must be current (not expired). If you're unable to provide the above documentation please contact us to discuss other options.

Section 3 – Certified identity documents (continued)

How to have your ID correctly certified




I certify this to be a true copy of the original document and confirm it represents the identity of Joe Smith.

Name: Jane Doe

Occupation: Justice of the Peace

Date: 18/08/2022

Signature: 

Photocopy ID at 150%

So the details are legible.

Please do not send in your physical identity documents e.g. passport, driver's licence, birth certificate etc.

Please note: Certification is valid for three months and must have been carried out within three months of application.

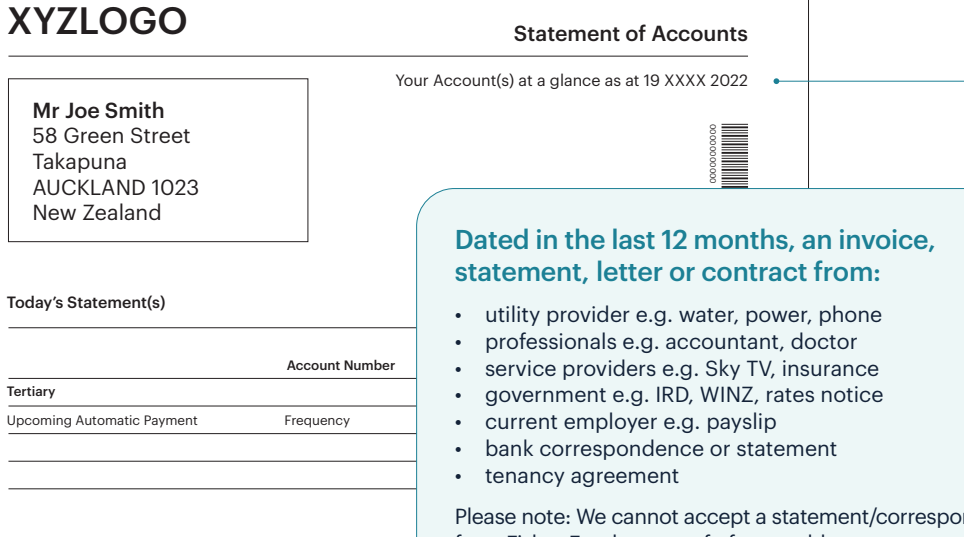
Your identity documents must be certified by one of the following people: Justice of the Peace, Registered Lawyer, Chartered Accountant, Registered Teacher, Registered Doctor, Police Officer, Notary Public, Registrar/Deputy Registrar.

Section 4 – Proof of address

If you have selected Option 2 as your preferred identification method please provide proof of your residential address as set out below. Your proof of address does not need to be certified. If you have selected Option 1 you don't need to provide proof of address.

Current physical address

Can't be a PO Box number



XYZLOGO

Mr Joe Smith
58 Green Street
Takapuna
AUCKLAND 1023
New Zealand

Statement of Accounts

Your Account(s) at a glance as at 19 XXXX 2022

Today's Statement(s)

Account Number

Tertiary

Upcoming Automatic Payment	Frequency

Dated in the last 12 months, an invoice, statement, letter or contract from:

- utility provider e.g. water, power, phone
- professionals e.g. accountant, doctor
- service providers e.g. Sky TV, insurance
- government e.g. IRD, WINZ, rates notice
- current employer e.g. payslip
- bank correspondence or statement
- tenancy agreement

Please note: We cannot accept a statement/correspondence from Fisher Funds as proof of your address.

Section 5 – Your withdrawal options

Full withdrawal

Withdraw the full value of my Australian superannuation funds

Partial withdrawal

Withdraw \$ (minimum withdrawal amount is \$500)

Section 6 – Payment details

We will only make payments in New Zealand dollars to either a New Zealand bank account or an international bank account held in your name either individually or jointly (the cost of an international transfer is paid by the member). Any payment will be adjusted for tax at the notified PIR on your account.

Name of account

Account details

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank	Branch	Account Number						Suffix								

Bank/Branch address

Please provide proof of your bank account (one of the following)

- Bank statement
- Internet banking screenshot
- Over the counter receipt with a teller's stamp

The proof of bank account must contain the account name, number and the logo of your bank.

Section 7 – Privacy statement

Any information that you provide to us may be used by Fisher Funds and the Supervisor and any of their respective related entities, and by other service providers to provide services in relation to your withdrawal request. You have the right to access the information held by us and you may also request that it be corrected.

Section 8 – Statutory declaration

If you have previously made a partial withdrawal and completed this section, you do not need to complete it again.

A Statutory Declaration is a written statement that allows a person to declare something to be true. This page will need to be completed in front of an authorised person who will witness the declaration.

Who can witness me making the declaration?

The following people can witness you making the declaration

- Notary Public
- Justice of the Peace
- Enrolled solicitor or barrister of the high court

I,
Name of KiwiSaver member

of
Address Occupation

solemnly and sincerely declare that:

- I am applying for a withdrawal of my Australian superannuation funds from my KiwiSaver account.
- I am retired and do not intend to be gainfully employed again on either a full time or part time basis.
- I understand that my withdrawal value may fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my KiwiSaver account.
- The information given in this form is true and correct. I acknowledge that the Manager (Fisher Funds Wealth Limited) and the Supervisor will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against any claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- I understand that the Manager and/or Supervisor will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- I understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant.
- I have read the privacy statement in this form.

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

Your signature

Declared at

Address

Date

Before me

Name of authorised witness

Signature of authorised witness

Date

Checklist

Please complete the checklist below and supply the relevant documents to support your request.

- Complete Sections 1-5.
- Provide proof of your bank account (refer to Section 6 for our requirements).
- Select a preferred identification method in Section 2 and provide evidence (refer to Sections 2, 3 & 4).
- Complete the Statutory Declaration in Section 8 in front of a Justice of the Peace, Solicitor, Notary Public or other person authorised to take statutory declarations.

You can find a Justice of the Peace near you by visiting the New Zealand's Justices' Association website jpfed.org.nz or Yellow Pages yellow.co.nz. They will be able to certify your ID and witness your statutory declaration.