

Foreign Superannuation Taxation Withdrawal Form

You may use this form to apply to withdraw an amount under clause 14C of the KiwiSaver Scheme Rules for the payment of the following:

- a tax liability arising from a foreign superannuation scheme transfer to a KiwiSaver scheme; or
- Student Loan repayment obligations arising from a foreign superannuation scheme transfer to a KiwiSaver scheme, each a 'relevant obligation'.

For more information on eligibility and how much you may be entitled to, please see clause 14C of the KiwiSaver Scheme Rules.

Your application must be made within 24 months of the end of the month in which the relevant obligation is assessed.

Please send the completed form and supporting documents to **Fisher Funds KiwiSaver Plan, Private Bag 93502, Takapuna, Auckland 0622**. If you require assistance completing this form or have questions, please contact us on **0508 347 437**.

Section 1 – Member details (complete all applicable fields)

Title	First name(s)	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address		
<input type="text"/>		
City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home phone	Business phone	Mobile
<input type="text" value="()"/>	<input type="text" value="()"/>	<input type="text" value="()"/>
Email address		
<input type="text"/>		
Tax period	IRD number	Date of birth
<input type="text"/>	<input type="text" value="○ ○ ○ ○ ○ ○ ○ ○ ○ ○"/>	<input type="text" value="/ /"/>

Supporting documents required

- Completed IR 496, KiwiSaver member calculation sheet
- Evidence from Inland Revenue confirming the amount of the relevant obligation (assessment of IR 3 Income Tax Return)

Section 2 – Your withdrawal options

Full withdrawal
Withdraw all available funds

Partial withdrawal
Withdraw \$

Section 3 – 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 4 – 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 License

* 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 4 – 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 5 – 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

Today's Statement(s)

	Account Number
Tertiary	
Upcoming Automatic Payment	Frequency

Statement of Accounts

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



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 6 – Statutory declaration

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 member

of
Address Occupation

- request a withdrawal from my Fisher Funds KiwiSaver Plan account as permitted by clause 14C of the KiwiSaver Scheme Rules
- have attached evidence of my relevant obligation
- confirm that the information provided in this form and in all supporting documents is true and correct

and 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.

- A certified photocopy of identification and proof of residential address (as listed above)
- Supporting evidence to verify your relevant obligation
- Ensure all sections of this form are complete
- Sign the form yourself and have it witnessed