

Mercer KiwiSaver scheme

PERMANENT EMIGRATION—REQUEST FOR WITHDRAWAL OF KIWISAVER FUNDS TO ANY COUNTRY (OTHER THAN AUSTRALIA)



If you've permanently emigrated to Australia, please complete a 'Permanent Emigration to Australia' form.

This form is for members wishing to request a withdrawal from their KiwiSaver Member's Account on the grounds of Permanent Emigration, or wishing to transfer their Member's Account balance to an authorised foreign superannuation scheme.


You may apply for a withdrawal of your KiwiSaver funds no earlier than 12 months after you permanently emigrate from New Zealand. You may apply to transfer your KiwiSaver funds to an authorised foreign superannuation scheme at any time following your permanent emigration.

Please be aware that by withdrawing or transferring your KiwiSaver funds you will forfeit all member tax credits and any unvested employer contributions accrued to your Member's Account. By law any member tax credits you have accrued must be returned by the Manager to the Government.

Please note that all fields on the form must be completed or the form will be returned to you.

Privacy Statement

The information in this form and any required supporting documentation is being collected so that your withdrawal request can be processed and a payment made. Mercer (N.Z.) Limited and the Trustee have access to this information. Access is subject to strict security arrangements, and the Trustee and Mercer will comply with the Privacy Act 1993 when dealing with this information. Please read the section titled "Privacy" in the Mercer KiwiSaver scheme Investment Statement for further details.

Please print in black or blue pen, in uppercase, one character per box and  all that apply.

STEP 1 – IDENTITY

In this section we need to confirm that you are who you say you are.

Membership number

Date of birth

IRD number

Title Mr Mrs Ms Miss Other (please specify _____)

First name

Middle name(s)

Surname

Residential address

Number Street name

Suburb

City

Postcode

Provide your mailing address if it's different from your residential address, otherwise leave blank

Mailing address

Number Street name/PO Box

Suburb

City

Postcode

Telephone

Business hours

After hours

Mobile

E-mail

STEP 2 – PAYMENT DETAILS

Please select whether you would like to withdraw your KiwiSaver funds **or** transfer them to an authorised foreign superannuation scheme.

A **Withdrawal**

I wish my funds to be:

- credited to my New Zealand bank account (a bank encoded deposit slip or a copy of a bank statement needs to be attached)
- sent to me by cheque (this will be sent to the address shown on previous page)

Note: Mercer will only make payments in New Zealand dollars to a New Zealand Bank Account, or we can send a cheque in New Zealand dollars.

OR

B **Transfer to an authorised foreign superannuation scheme**

Name of scheme

Address of scheme

Phone number and name of scheme contact

This must be a scheme authorised by the Government under the KiwiSaver Regulations.

For more information visit www.kiwisaver.govt.nz or contact the Inland Revenue on **0800 KIWISAVER**.

STEP 3 – DOCUMENTATION

To be eligible to withdraw or transfer the funds from your KiwiSaver account you must have permanently emigrated from New Zealand.

To confirm this please provide the following with your application:

1. Proof of your departure from New Zealand (e.g. a photocopy of the entry stamp in your passport or other travel documents), **and**
2. Proof that you have lived at an overseas address at some time during the year following your departure from New Zealand (i.e. a bank statement or utility bill), **and**
3. Proof of your visa for living in another country, if applicable. (e.g. a photocopy of the visa), **and**
4. If evidence you are supplying, indicates you have temporarily returned to New Zealand since permanently emigrating (e.g. for a holiday) please indicate the reasons for the return, on the document.

STEP 4 – CONFIRMING YOUR IDENTITY

Provide a certified photocopy of current and valid documents.



Copies of your documents can be certified by one of the following: Justice of the Peace, Notary Public, Member of Parliament or Solicitor.

The certifier must view the original document (not a fax, photocopy or scan) before writing their full name, occupation, date and signature and make a statement to the effect that the document(s) provided are a true copy and represent the identity of the named individual. Certification is valid for three months.

For a full list of acceptable documents and how these can be certified please visit Documents and Forms section on mercerkiwisaverscheme.co.nz website.

A **Confirm your identity by providing a CERTIFIED COPY of (documents must be current and valid):**

Option 1 – One of the following (please tick one):

- Passport OR NZ Firearms Licence OR Government issued identity card

Document description

Document number

OR

Option 2 – Two of the following (please tick both):

- Drivers Licence PLUS Birth Certificate OR Credit Card/EFTPOS (with name and signature)

Document description

Document number

Document description

Document number

B **Confirm your residential address by providing an original or a certified copy of one of the following (can't be more than three months old):**

- Bank statement OR Utility bill



New Zealand Legislation: Acts

Acts are laws made by Parliament.

Crimes Act 1961

Section 111 - False statements or declarations

Everyone is liable to imprisonment for a term not exceeding 3 years who, on any occasion on which he is required or permitted by law to make any statement or declaration before any officer or person authorised by law to take or receive it, or before any notary public to be certified by him as such notary, makes a statement or declaration that would amount to perjury if made on oath in a judicial proceeding.

STEP 5 – DECLARATION

Please complete this section in front of an approved person (being generally one of the persons listed below):

- (1) A declaration made in a Commonwealth country may be made before a notary public, Judge, a Commissioner of Oaths, a Justice of the Peace, or any person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding.
- (2) A declaration made in a country other than a Commonwealth country shall be made before a notary public, or before a Commonwealth representative, or before a Judge.

I _____
Full name

Of _____
Abode and Occupation

- Request a withdrawal/ transfer of my KiwiSaver Member's Account balance excluding any member tax credits and any unvested employer contributions (i.e: employer contributions I am not yet entitled to), on the grounds of my permanent emigration.
- Understand that payment of any benefit is at the discretion of the Manager.
- I solemnly and sincerely declare that I permanently emigrated from New Zealand on _____ day of _____ 20____ and that all the information I have provided in this form regarding my application 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.

Signature of member

Declared at _____ this _____ day of _____ 20____
Location Day Month Year

Before me (Please print) _____
Person authorised to take statutory declarations Please specify office held

Signature

Please return your completed form to:
Mercer (N.Z.) Limited
PO Box 1849
Wellington 6140
New Zealand

Mercer KiwiSaver scheme

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STOP: Before you submit your application, please take a moment to ensure that all of the criteria below have been met. If you submit an incomplete application, even with the intention of sending on other parts of it when they become available, this could mean that your application is delayed.

Your application must meet all of these requirements:

1. You must provide proof of your identity and residential address.
2. You must provide a statutory declaration that you emigrated from New Zealand at least 12 months before the date on which the declaration is made by completing the necessary section of the form. A declaration made in a Commonwealth country may be made in front of a notary public, Judge, a Commissioner of oaths, or a Justice of Peace. A declaration made in a country other than a Commonwealth country must be made in front of a notary public, a Commonwealth representative or a Judge.
3. You must provide documentary evidence to support the date you left New Zealand. A **certified copy*** of a passport stamp, a travel agent ticket or a record of travel from the immigration department.
4. You must provide proof that you have lived at an overseas address at some time during the year following your departure from New Zealand. A utility bill, rental lease agreement or bank statement can be used to confirm this.
5. Your contact address must be an overseas address.
6. Your payment option must allow a direct transfer in New Zealand dollars to a New Zealand bank account, or we can send a personal cheque to you in New Zealand dollars.
7. If evidence you are supplying, indicates you have temporarily returned to New Zealand since permanently emigrating (e.g. for a holiday) please indicate the reasons for the return, on the document.

* Document copies must be certified as true copies by a Lawyer, Justice of the Peace or Notary Public.