

**Mercer KiwiSaver scheme**

# PERMANENT EMIGRATION TO AUSTRALIA (OR TRANS-TASMAN PORTABILITY)—REQUEST FOR TRANSFER OF KIWISAVER FUNDS




This form is for members wishing to request a transfer of their KiwiSaver Account on the grounds of Permanent Emigration to Australia (or Trans-Tasman Portability).

You may apply for a transfer of your KiwiSaver Funds at any time after you have permanently emigrated to Australia from New Zealand.

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 (the Manager) and the scheme's Trustee have access to this information. Access is subject to strict security arrangements, and the Manager and the Trustee 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 – DETAILS OF FUND IN AUSTRALIA**

Fund name

Fund e-mail

**Fund postal address**

Number  Street name/PO Box


Suburb  State    Postcode

Fund phone number

Your membership/customer number

Australian business number (ABN)

Superannuation product identification number (SPIN)

 You must check with your fund in Australia to ensure they can accept this transfer.

**STEP 3 – DOCUMENTATION AND CONSENT**

To be eligible to transfer your KiwiSaver funds to an APRA approved fund in Australia 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 (eg: 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).

**Please read and tick  each section below:**

- I understand that any information I give to *the Manager* may be passed on to my chosen Australian Superannuation fund as reasonably required and I authorise *the Manager* to give such information in relation to this transfer as requested by my chosen Australian Superannuation fund.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian Superannuation fund, and that I am liable for any such tax consequences.
- I acknowledge that *the Manager* has recommended that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- I understand that any annual Government contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to the Commissioner of Inland Revenue.
- I understand that my *Mercer KiwiSaver scheme* account will be closed upon my *KiwiSaver* savings being transferred to my chosen Australian Superannuation fund.
- I understand that following a transfer of my KiwiSaver savings to an Australian Superannuation fund I will not be able to transfer them to a third country.
- I understand that my application is subject to the Manager's approval and that the Manager may request additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation fund named in step 2 of this application does not accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian Superannuation Fund, the Trustee and the Manager of the *Mercer KiwiSaver scheme* will be released from all liabilities in respect of my membership in the *Mercer KiwiSaver scheme*.
- I understand that the "New Zealand sourced" savings in my Australian Superannuation Fund will not be able to be accessed until the New Zealand age of retirement is reached (currently 65).
- I understand that once my *Mercer KiwiSaver scheme* savings have been transferred to Australia, they will become (with a few exceptions) subject to the rules and regulations governing the Australian Superannuation Fund.

**STEP 4 – DECLARATION**

Please complete this section in front of an approved person. A declaration made in Australia 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.



**Important:** Some police officers of some Australian states and pharmacists are not likely to be considered approved persons for this purpose.

I, \_\_\_\_\_, of \_\_\_\_\_, \_\_\_\_\_  
Print full name Address Occupation

Request a transfer of my KiwiSaver Member's Account balance including any member tax credits and kick-start contribution, on the basis of my permanent emigration to Australia.

Understand that payment of any benefit is at the discretion of the Manager.

**I solemnly and sincerely declare that:**

1. My principal place of residence during the period that I was a KiwiSaver scheme member was in New Zealand. (If you did not reside principally in New Zealand for any period, please specify the period(s). ) , and
2. I permanently emigrated from New Zealand on day \_\_\_\_\_ of \_\_\_\_\_ 20\_\_\_\_\_, and  
Day Month Year
3. 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

Before me (please print full name) \_\_\_\_\_  
Person authorised to take statutory declarations Please specify office held

Signature of authorised person



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