

MERCER KIWISAVER SCHEME

KIWISAVER RETIREMENT WITHDRAWAL— APPLICATION FORM



Determining your eligibility

You become eligible to withdraw your KiwiSaver savings when you qualify for New Zealand Superannuation (currently at the age of 65). However if you joined KiwiSaver between the age of 60 and 65, you'll only be able to withdraw your savings after you've been a KiwiSaver member for 5 years.

Processing times

Once we receive your fully completed form and your eligibility has been confirmed your KiwiSaver savings will be paid out to you in the month following your request being received and processed.

KiwiSaver account closure

Please note that your Mercer KiwiSaver scheme account will be closed once the full amount of your accumulated KiwiSaver funds has been paid out.

Privacy Statement

Information in this form and any requested documents are being collected to enable administration of this account. The Privacy Act entitles the account holder to access and to request correction of any personal information.

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.

Member number

IRD number

Title: Mr Mrs Ms Miss Other

Date of birth / /

First name

Middle name(s)

Surname

Residential address

NUMBER	STREET NAME
SUBURB	
CITY	POSTCODE

Mailing address (if different from residential address)

NUMBER	STREET NAME
SUBURB	
CITY	POSTCODE

Telephone

Mobile

Daytime

Evening

Email



STEP 2 – WITHDRAWAL AND AMOUNT PAYMENT INSTRUCTIONS

A Amount of withdrawal

Subject to the requirements of the trust deed for the Mercer KiwiSaver scheme, I request:

- a **partial** withdrawal of \$, , . (a maximum of four partial withdrawals can be made per calendar year with a minimum amount of \$500 per withdrawal)
- a **regular monthly** withdrawal of \$, , .
- a withdrawal of my **full** balance

! Your KiwiSaver account balance must remain above \$1,000 after a partial or a regular monthly withdrawal, otherwise the full amount will be paid out and your account will be closed.

For regular monthly withdrawals the first and subsequent payments will be processed on the 20th of each month (or the next working day) following this request being received and processed.

As you have reached the age of retirement, you are no longer eligible for additional Member Tax Credits and any additional employer contributions are at the discretion of your employer.

If you make a full withdrawal from your Mercer KiwiSaver scheme account, you will **no longer be a member** in the Scheme and your KiwiSaver account will be closed. A full withdrawal may take up to 20 days to process as we may not have received your final Member Tax Credit payment from Inland Revenue.

If applicable, please remember to cancel direct debits or automatic payments to your KiwiSaver scheme. If you are employed, please request your employer to stop making contribution deductions.

B Payment instruction

- I authorise my KiwiSaver funds to be credited to my bank account and attach a bank encoded deposit slip or copy of a bank statement printout.

! To enable your savings to be credited to your bank account, you must provide details of a personal account in your name. Business accounts, family trust accounts and accounts of another person will not be accepted.

STEP 3 – CONFIRMING YOUR IDENTITY AND ADDRESS

! Copies of your documents can be certified by one of the following: Justice of the Peace, Solicitor, Notary Public or Member of Parliament. For a full list of certifiers and acceptable documents and how these can be certified please read Confirmation of Identity Guide available on mercerkiwisaverscheme.co.nz website.

To the certifier: The certifier must view the original document(s) (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.

PROVIDE A CERTIFIED PHOTOCOPY OF CURRENT AND VALID DOCUMENTS.

A Confirm your identity by providing:

OPTION 1 – A certified photocopy of ONE of:

- A NZ / overseas passport
- A NZ firearms licence
- An overseas government national identity card.

OR OPTION 2 – A certified photocopy of ONE of: + ONE of:

- A NZ / international driver's licence; or
- An 18+ card.
- A NZ / overseas birth certificate; or
- A NZ / overseas citizenship certificate.

OR OPTION 3: A certified photocopy of: + ONE of:

- A New Zealand driver's licence
- A credit card, debit or EFTPOS card issued by a NZ bank with the name and signature on the card; or
- A SuperGold card or Community Services card.

B Confirm your residential address by providing an original or a copy of one of the following (can't be more than 6 months old):

- Bank statement
- OR Utility bill
- OR Inland Revenue statement



Member number

STEP 4 – STATUTORY DECLARATION

I, _____, of _____

Full name

Address

_____, _____

Address

Occupation

solemnly and sincerely declare that:

- I am entitled to make this claim and that all the information which I have provided in this form and in all included materials is true and correct.
- I have read the privacy information at the beginning of this KiwiSaver Retirement Withdrawal Application Form.
- I understand that should the information given in this form be incomplete or incorrect the manager of the Mercer KiwiSaver scheme will not be able to complete its assessment of this application without receiving complete and correct information.
- I consent to the use of the personal information provided in this KiwiSaver Retirement Withdrawal Application Form by the manager and the supervisor and their related companies so that they can assess and process my requested withdrawal from the Mercer KiwiSaver scheme. I understand that access to and correction of my personal information may be requested by me.
- I understand that if I withdraw my total Mercer KiwiSaver scheme account balance that my account will be closed and that I will be ineligible to open a KiwiSaver scheme account in the future.
- 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 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

CHECKLIST

Please tick that you have completed the form correctly:

- Entered your relevant details and requirements in Steps 1 and 2
- Included a bank encoded deposit slip or a copy of your bank statement
- Included photocopied and certified documents as per Step 3
- Completed the statutory declaration in Step 4 and have had your signature witnessed

 Please return your completed form to:

Mercer (N.Z.) Limited
PO Box 1849
Wellington 6140
New Zealand

