KiwiSaver
Poua he Oranga

TRANSFER FROM A COMPLYING SUPERANNUATION FUND

Please print in black or blue pen, in uppercase, one character per box. A ✓

Mercer KiwiSaver scheme

You must be a member of or have completed an application form for this scheme before transferring funds.

Step 1– Complete your personal details

Start here

Membership number

IRD number

Title Mr ○ Mrs ○ Ms ○ Miss ○ Other ○ (please specify _____)

Given names

Surname

Street address

Postcode

Date of birth

Telephone

Business hours

After hours

Mobile

Fax

E-mail

Issued by Mercer (N.Z.) Limited as Manager of the Scheme.

MERCER

Membership number

Step 2 – Your transfer

To ensure an efficient transfer, please contact your Complying Superannuation Fund scheme provider stating your intention to transfer to the Mercer KiwiSaver scheme. Please note: the Mercer KiwiSaver scheme relies upon data and funds being provided by the Complying Superannuation Fund scheme provider and can only proceed once that data and funds are available.

Amount to be transferred from a Complying Superannuation Fund:

☐ Full balance

or ☐ Specified amount $ ☐☐,☐☐☐.☐☐

Name of previous provider

Name of previous scheme or plan

Previous member/policy number

Address of previous provider

Phone number of provider

Fax number of provider

Step 3 – Sign the form

By signing this form, I understand that:

- My transfer from the Complying Superannuation Fund will be effective from the date the transfer is received by the Manager of the Mercer KiwiSaver scheme.
- My request will not be actioned if any information is incomplete or ambiguous.
- The information on this form will be handled by the Trustee to process my transfer from the Complying Superannuation Fund specified on this form.
- To process my transfer from the Complying Superannuation Fund, the Trustee may disclose my personal information to the Manager or any other party necessary and I consent to the handling of my personal information in this way.
- The transfer from the Complying Superannuation Fund will be invested in accordance with my current choice of investment options.
- I authorise the Manager to receive the transfer of funds and associated data from the provider of the Complying Superannuation Fund.
- If the contact details on this form are different from the details on my member record, the Manager may update these (unless I advise otherwise).

Signature* ✗ Date ☐☐/☐☐/☐☐☐☐

* Where applicable, the signature of the parent or legal guardian of the applicant. If, so please specify:

Relationship of parent/guardian

Please return your completed form to:

Mercer (N.Z.) Limited
PO BOX 1849
Wellington 6140

MKS_Transfer in Complyin Form_2012

Issued by Mercer (N.Z.) Limited as Manager of the Scheme.