

Retirement Withdrawal Form

If you would like help completing this form, please email info@generatekiwisaver.co.nz or phone us on 0800 855 322.

Please use this form to apply for a retirement withdrawal or set up a regular withdrawal from your KiwiSaver account. This form must be completed no earlier than four weeks from your retirement withdrawal date.

You are eligible to withdraw some, or all of your KiwiSaver savings when you reach the qualifying age (currently 65). However, if you joined KiwiSaver prior to 1 June 2019 and have not been a member of KiwiSaver or a Complying Superannuation Fund for 5 years, if you make a withdrawal you will lose eligibility to any future Government or Employer Contributions.

Once we receive your completed application, which includes all the required supporting documentation, the withdrawal amount specified by you in the form will be paid into your nominate bank account within 10 business days. Please note your payment may be subject to delays if deductions or final payments are to be made by Inland Revenue.

Document checklist:

Please complete the checklist below and supply all the relevant supporting documents.

- Completed withdrawal form.
- Provide proof of your bank account (refer to page 2).
- Provide a **certified** copy of identity (refer to table on page 3 for approved identity documents).
- Provide a copy of residential address (refer to table on page 3 for our requirements).
- Confirm your New Zealand residency on page 4 (Statutory Declaration).
- Complete the Statutory Declaration on page 4 in front of a Justice of the Peace, Solicitor, Notary Public or other person **authorised** to take statutory declarations.

Member Details

Title _____ First Name _____ Middle Name _____

Surname _____ Date of Birth

D	D	M	M	Y	Y	Y	Y
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Residential Address _____

City _____ Country _____ Postcode _____

Home Phone _____ Work Phone _____

Mobile _____ Email _____

Generate KiwiSaver Member Number

G	E	N							
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IRD No.

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If you don't know your IRD number, please call the IRD on 0800 227 774.

Retirement Withdrawal Form

Your Withdrawal Options

Please pick one of the following withdrawal options:

Withdraw all of my savings;

Withdraw part of my savings (minimum withdrawal of \$100); **Amount \$** _____

Set up a regular facility to withdraw my savings (minimum withdrawal of \$100). **Amount \$** _____

Frequency Weekly Fortnightly Monthly Quarterly Yearly **Start Date** _____

Payment Details

We will only make payments in New Zealand dollars to a New Zealand bank account in your name (held individually or jointly).

Account Holder's Name _____

Account Number

Bank _____ Branch _____

Address/PO Box _____

Town/City _____

Proof of your Bank Account (mandatory)

Please provide proof of your bank account name and number by supplying any one of the following:

- a pre-coded deposit slip
- a copy of a cheque
- a copy of a bank statement
- an over-the-counter printed receipt with a tellers stamp, signature and date
- an online bank account statement with the name of the bank in the header/footer

Retirement Withdrawal Form

Identity and Proof of Address Documents (mandatory)

OPTION 1	OPTION 2
<input type="checkbox"/> Passport; or <input type="checkbox"/> New Zealand Drivers Licence; or <input type="checkbox"/> New Zealand Firearms Licence.	<input type="checkbox"/> Birth Certificate; or <input type="checkbox"/> Citizenship Certificate. AND one of the following: <input type="checkbox"/> Kiwi Access Card; or <input type="checkbox"/> Tertiary Student Photo ID; or <input type="checkbox"/> Current International Driving Permit
<p>Choose one of the acceptable forms of proof of address for applicant's residential address (not a PO Box) by sending us a copy of an invoice, statement, letter or contract in applicant's name, dated within the last 12 months, from one of the following sources:</p> <input type="checkbox"/> Utility provider e.g. water, electricity, gas, telecommunications, Sky TV (or other fixed address media provider) <input type="checkbox"/> Government or local Government agency e.g. IRD, benefits statement, Council notice <input type="checkbox"/> NZ bank correspondence <input type="checkbox"/> Non-Generate KiwiSaver correspondence <input type="checkbox"/> Car registration notification/demand	
<p>If you do not have one of the above forms then please provide copy of an invoice, statement, letter or contract in applicant's name, dated within the last 3 months, from one of the following sources:</p> <input type="checkbox"/> Electronic white pages <input type="checkbox"/> Rental tenancy agreement <input type="checkbox"/> Non-bank, non-KiwiSaver financial institution <input type="checkbox"/> Insurance company	

Certification of your Documents (mandatory)

Provide originals or have an approved person certify copies of all identity documents; and proof of address (which is not required to be certified).

An employee or agent of Generate can verify original documents by sighting the original documents and then making the following statement "I verify that I have sighted the originals of the attached documents and the documents are exact copies of the original."

 Certification must be within the last three months.
 The approved person cannot be your spouse, partner, relative or living at the same address as you.
 The approved person could be: a JP; Chartered Accountant; Lawyer; Police Officer; Registered Teacher; Registered Doctor or any other person who has legal authority to take statutory declarations in New Zealand.
 Upon comparing the copy with the original document, the approved person must write on the copy their name, occupation, their signature, the date and the following, "I certify this to be a true copy of the original document and confirm that it represents the identity of [full name of person being identified]"

Privacy Act

Generate Investment Management Limited, Public Trust, any of their authorised agents, and any distributor assisting with the application (each an "Authorised Person") may collect personal information about the member provided in connection with this application or the Scheme, will (or through MMC New Zealand Limited will) hold the information securely and may use the personal information to manage the member's investment in the Scheme, to communicate with the member or to promote other products and services to the member. The member may ask that he or she be shown the information held about the member, and if any of the information is incorrect, ask for it to be corrected. The addresses for Generate Investment Management Limited and Public Trust are set out in the Generate Product Disclosure Statement.

Where do I send my application to?

Email return: Please scan this application and all supporting documentation and email them to us at info@generatekiwisaver.co.nz or

Postal return: Please send this application and any supporting documentation to: Generate KiwiSaver Scheme, PO Box 91609, Victoria Street West, Auckland 1142

Retirement Withdrawal Form

Statutory Declaration

I _____ first name _____ middle name _____ surname _____ (full legal name of person making declaration)

_____ (occupation (or unemployed/retired) of person making declaration)

of _____ street _____ suburb _____

_____ city _____ postcode _____ (full residential address of person making declaration)

solemnly and sincerely declare that:

- I am a member of the Generate KiwiSaver Scheme.
- I am applying to withdraw or transfer some or all of my KiwiSaver savings from my Generate KiwiSaver Scheme account. I understand that on full payment of my full account balance, I will no longer be a member of KiwiSaver. I agree to release all claims that have been made by me on the Manager and/or Trustee in relation to the Generate KiwiSaver Scheme.
- I understand that my withdrawal value will or might fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my Generate KiwiSaver Scheme account.
- The information given in this form is true and correct. I acknowledge that the Manager and the Trustee of the Generate KiwiSaver Scheme will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against and claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- I understand that the Manager and/or Trustee of the Generate KiwiSaver Scheme will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- I understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant including a government agency or reliable, independent source.
- I have read the privacy statement in this form.
- I consent to Generate electronically verifying my identity by passing my information to and checking it with the document issuer, official record holder and authorised third parties. I understand that Generate may still require original and certified copies of my identity and/or proof of address.

- Please tick one (this relates to the withdrawal of Government contributions):

During my KiwiSaver membership, my principal place of residence was New Zealand, or

During my KiwiSaver membership, there were periods when my principal place of residence was not New Zealand (please specify):

_____ month / year _____ to _____ month / year _____ (insert dates)

_____ month / year _____ to _____ month / year _____ (insert dates)

And I make this solemn declaration conscientiously believing the same to be true and by the virtue of the Oaths and Declarations Act 1957.

Signature of person making the declaration _____

Declared at _____ Address _____ this _____ Date _____ of _____ Month _____ 20 _____ Year _____

Before me (name, occupation, address and signature of person before whom the declaration is made)

Name _____

Occupation _____

Address _____

Signature _____

Stamp

Statutory declaration made in New Zealand

A statutory declaration made in New Zealand under the Oaths and Declarations Act 1957 must be made before a person described in section 9 of that Act including:

- a Justice of the Peace;
- a Barrister and Solicitor of the High Court;
- a Notary Public;
- the Registrar or Deputy Registrar of the High Court or of any District Court;
- a member of Parliament;
- Officers of the Crown or of a local authority within the meaning of the Local Government Act 2002, authorised for that purpose by the Minister of Justice by notice in the *Gazette*; or
- an employee of Public Trust constituted under the Public Trust Act 2001, authorised for that purpose by the Minister of Justice by notice in the *Gazette*.