

Court Ordered Withdrawal Form

Please upload this completed form via the Generate App or email to us.

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

To be eligible for this type of withdrawal, you are required to have a court order that permits you to make an early withdrawal from your KiwiSaver account.

The payment will be made into the required bank account as stated on the court order within **10 business days** of the court order being approved.

Document checklist:

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

- Provide a **certified** court order (signed, stamped and sealed by the court).
- Provide a **certified** proof of identity for the member (applicant). (refer to table on page 2 for approved identity documents).
- Provide proof of residential address for the member (applicant). (refer to table on page 2 for our requirements).
- Provide proof of valid bank account for the beneficiary or solicitor (refer to page 1 for proof of bank requirements).
- Complete the Statutory Declaration on page 3 in front of a Justice of the Peace, Solicitor, Notary Public or other person **authorised** to take statutory declarations.

Member (Applicant) 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 or visit www.ird.govt.nz/tasks/find-my-ird-number

Proof of your Bank Account

New Zealand Bank account of beneficiary or solicitor

Please provide a bank record or document that:

- includes the bank account name
- includes the bank account number
- includes the bank logo

Examples of this include a bank statement, an online bank account statement, an over the counter printed bank receipt with a tellers stamp, signature and date, a pre-coded deposit slip or copy of a cheque.

Where do I send my application to?

Via the app: Simply login to your app and upload your application and all supporting documentation directly to our withdrawals team for processing **or**

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

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Electronic Verification of Identity and Proof of Address (Required for all Signatories)

If you agree to Electronic Identity Verification please tick the box below. If we are unable to identify you using this method or you do not consent, you will need to provide certified ID and address documents as per the Non-Electronic Verification of Identity and Proof of Address section below.

Electronic Identity Verification and Proof of Address

Generate can confirm the identity and/or New Zealand address of many of our clients electronically, with their permission. Please note that we use an external third party system not owned by Generate to conduct identity checks in this way.

I confirm that I give Generate authority to check my identity and/or address electronically using the documentation provided.

I have included a copy of my identification – either a current signed Passport or current Driver Licence (front & back) from New Zealand or Australia. Please note, if we are unable to identify you using this method, we will contact you to provide physical documents.

Non-Electronic Verification Identity and Proof of Address

If you have opted not to use Electronic Identity Verification, you will need to provide the following documentation to complete your application.

CERTIFIED COPY OF IDENTIFICATION

OPTION 1

- Passport; or
- New Zealand Driver Licence ; or
- New Zealand Firearms Licence

OPTION 2

- Birth Certificate; or
- Citizenship Certificate

AND one of the following:

- Kiwi Access Card (18+); or
- Tertiary Student Photo ID; or
- Current International Driving Permit and a driver licence from another country

CERTIFICATION OF YOUR DOCUMENTS

Provide certified copies of identity documents.

- Certification must be within the last three months.
- Any birth certificates that have been issued before 2003 should be certified or verified.
- 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]"**

PROOF OF ADDRESS

Choose one of the acceptable forms of **proof of address** by sending us a copy of an invoice, statement, letter or contract which shows: The applicant's name, is dated within the last 12 months, shows the full residential address (not a PO Box) and displays the Company logo.

- Utility provider e.g. water, electricity, gas, telecommunications, Sky TV (or other fixed address media provider)
- Government or local Government agency e.g. IRD, benefits statement, Council notice
- New Zealand Bank correspondence
- Car registration notification/demand
- Non-Generate KiwiSaver correspondence
- Insurance company (car, house, contents)
- Rental tenancy agreement

If you do not have one of the above forms then please provide a copy of an invoice, statement, letter or contract in applicant's name, dated within the **last 3 months**, from one of the following sources:

- Non-bank, non-KiwiSaver financial institution
- Insurance company (health, life)

Privacy Statement

Generate Investment Management Limited (or Generate group companies), Public Trust, any of their authorised agents, and any distributor (each an "Authorised Person") may collect and hold the personal information that you provide to us as part of this application.

Your information will be used by Generate and the Supervisor to manage your relationship with Generate and the Supervisor, to provide products and services to you, to comply with any applicable laws, to offer you further products and services that may be of interest to you and for any other use for which you have given authorisation. We may also disclose your personal information for these purposes to our staff members, related companies, our third party service providers and to the Financial Markets Authority or other applicable regulators. Generate may further use your information to electronically verify your identity. We may pass your information to and check it with the document issuer, official record holder and authorised third parties that Generate has contracted to carry out the verification process. Generate may share your information and the results of the verification process with appropriate third parties (such as a distributor or adviser that will or has been providing services to you) to enable that third party to comply with any applicable laws.

You may request a copy of the information held about you, and if any of the information is incorrect, ask for it to be corrected. You can do this by contacting us by email or call us on 0800 855 322.

For further information about how we handle your personal information, please read our Privacy Statement available at generatewealth.co.nz/privacy-statement/.

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Statutory Declaration

Statutory declaration made in New Zealand

A statutory declaration made in New Zealand must be made before a person entitled to witness a statutory declaration under the Oaths and Declarations Act 1957. Such as a Justice of the Peace, Solicitor, Notary Public, Registrar or Deputy Registrar of the High Court or any District Court or a member of Parliament.

Note: What you write must be true. You can be prosecuted if you make a false declaration. If the statutory declaration is not completed in full, you will be required to have the amendment initialled and dated by the same witness.

Ensure you include your occupation. If you, the member, are either retired or unemployed please note this in the occupation box. Do not leave this field blank.

I (full legal name as seen on ID)

of (full residential address)

and (occupation (or unemployed/retired))

solemnly and sincerely declare that:

- I have read and understood the Privacy Statement.
- All information I have provided is true and correct.
- I understand that should the information given be incomplete or incorrect, Generate will not be able to complete its assessment of my application without receiving the complete and correct information.
- I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed and can be affected by market volatility, PIE tax and eligibility to receive government contributions.
- Where applicable, I agree that Generate may approach the solicitor who submits this application to provide further information as reasonably required. I hereby authorise the solicitor to give such further information. A photocopy of this authorisation shall be read as the original.

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

New Zealand has always been my principal place of residence since I first joined KiwiSaver, or

New Zealand has always been my principal place of residence since I first joined KiwiSaver except for the period(s) below. (please specify):

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

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

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 member)

Declared at (place)

On (date)

Before me (person before whom the declaration is made)

Full Name (of person authorised to take declaration)

Occupation (of person authorised to take declaration)

Signature (of person authorised to take declaration)
