

## Permanent Emigration Withdrawal Form

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

Please use this form if you have permanently emigrated from New Zealand and you have lived overseas (except Australia) for at least 12 months. If you have permanently emigrated to Australia you cannot make a withdrawal on the grounds of permanent emigration. However you will be able to transfer all of your KiwiSaver funds to a participating Australian superannuation scheme (subject to a maximum transfer amount). Please contact your Australian superannuation scheme provider to obtain a transfer form.

**Document checklist:**

- Provide proof of bank account (refer to page 2)
- Provide **certified** proof of identity (refer to page 2)
- Provide proof of overseas residential address (refer to page 2)
- Provide proof of departure (refer to page 2)
- Complete the Statutory Declaration in front of a Justice of the Peace, Solicitor, Notary Public or other person **authorised** to take Statutory Declarations.
- Provide a copy of residency visa (if you are on a NZ passport).

### 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.

### Payment Details

We will only make payments in New Zealand dollars to either a New Zealand bank account or an international bank account in your name. (The cost of an international transfer is paid by the member). We will adjust your withdrawal amount for any tax liability.

Account Holder's Name \_\_\_\_\_

Swift Code (if an overseas bank account) \_\_\_\_\_

Account Number 

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Bank \_\_\_\_\_ Branch \_\_\_\_\_

Address/PO Box \_\_\_\_\_

Town/City \_\_\_\_\_

## Permanent Emigration Withdrawal Form

### Proof of your Bank Account

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 bank statement
- an online bank account statement with the name of the bank in the header/footer
- a copy of a cheque
- an over-the-counter printed receipt with a tellers stamp

### Proof of Departure from New Zealand

- Please provide evidence of confirmed travel arrangements, copy of passport pages showing departure date stamp or evidence of necessary visas.
- Immigration NZ travel movement report.

### Identity and Proof of Address Documents (mandatory)

#### OPTION 1

- Passport; or
- New Zealand Drivers Licence; or
- New Zealand Firearms Licence.

#### OPTION 2

- Birth Certificate; or
- Citizenship Certificate.

**AND** one of the following:

- Kiwi Access Card; or
- Tertiary Student Photo ID; or
- Current International Driving Permit

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:

- 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
- NZ bank correspondence
- Non-Generate KiwiSaver correspondence
- Car registration notification/demand

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:

- Electronic white pages
- Rental tenancy agreement
- Non-bank, non-KiwiSaver financial institution
- 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 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, Public Trust and MMC Limited are set out in the Product Disclosure Statement for the Scheme.

### 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](mailto: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

## Permanent Emigration 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 member of the Generate KiwiSaver Scheme.
- I am applying to withdraw or transfer my balance from the Generate KiwiSaver Scheme.
- I understand that any Member Tax Credit amounts will not be paid to me and will instead be repaid to Inland Revenue.
- I confirm that I permanently emigrated from New Zealand at least 12 months ago.
- I agree that by withdrawing from the Generate KiwiSaver Scheme I am ending my membership and all claims that have been made or may be made by me on the Manager and/or the 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 any 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 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.

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*.