## **Trans-Tasman Transfer Form**

Please upload this completed form via the Generate  $\mbox{\sc App}$  or email to us.

 $If you would like help completing this form, please email info@generate kiwis aver. co.nz or phone us on 0800\,855\,322 or +6496005100 (overseas).$ 

Please use this form to transfer your KiwiSaver Scheme savings to a complying Australian Superannuation fund. You are eligible to transfer your KiwiSaver Scheme savings if you have left New Zealand to live permanently in Australia and the Australian Superannuation fund you are transferring to accepts transfers from New Zealand KiwiSaver Schemes. If you haven't done so already, please check with your Australian provider that this is the case before completing this form.

Once all requirements have been fulfilled and we obtain confirmation from the Inland Revenue regarding Government contributions (allow 10 working days for this process), your withdrawal will be processed within 5 working days. For payments to overseas bank accounts, kindly allow up to 15 days from the date of payment for the funds to clear.

Document checklist:	
Please complete the checklist below and supply all the relevant supporting docume	nts.
Completed application form	
Complete Statutory Declaration	
We require the following documentation:	
A <b>certified</b> copy of your passport, New Zealand driver licence or firearms licence	ce. Please refer to page 3 for further information on identity documents required.
A letter from your Australian Superannuation fund confirming their acceptance It must show the bank account name, bank account number and swift code.	of KiwiSaver Scheme transfers and their bank account details for the transfer.
Evidence of your permanent residence at an Australian address, for example:  - Bank statement; or  - A recent utility bill, e.g. water, electricity, gas, internet, landline (not mobile); or  - Signed tenancy/leasing agreement for an overseas property; or  - Signed copy of a property sale and purchase agreement; or  - A letter for car or house insurance; or  - A letter for health of life insurance must be dated within 3 months.	
- A copy of your passport page showing arrival stamp; or	
Member Details	
Title First Name	Middle Name
Surname	Date of Birth
Current Residential Address in Australia	
City Country	Postcode
Home Phone	Work Phone
Tomerhole	WORKTHONE
Mobile	Email
Generate KiwiSaver Member Number G E N	IRD No.  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
Prescribed Investor Rate (PIR) (please tick one)	S. Voc. Transportation and the second manner
10.5%	
17.5%	
28%	
Note: Before processing this transfer, if approved, if any of the tax payment details di information provided. Please go to generatekiwisaver.co.nz/whats-my-pir to work ou	

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

# Generate KiwiSaver Scheme

## **Trans-Tasman Transfer Form**

Complying Australian Superannuation Fund Det	ails
ManaharNusahar	Australian Duais aga Numbar (ADN)
Member Number	Australian Business Number (ABN)
Australian Provider Name	
Postal Address	
	Postcode
Phone	Email
Trans-Tasman Permanent Emigration Transfer In	nstructions
Thave nermanently emigrated to Australia and request my KiwiSaver Schem	e balance to be transferred to my account in the Australian Superannuation
fund named above.	e balance to be transiented to my deceanem and Adstrainante aperannadaen
Date you left New Zealand	
Payment Details	
This needs to be filled out in full.	
Name of Bank Account	
Sort Code / BSB	Swift Code
Account Number	
Account Number	
Bank	Branch
Address/PO Box	
Town/City	

## Generate KiwiSaver Scheme

### **Trans-Tasman Transfer Form**

#### 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

Government or local Government agency e.g. IRD, benefits statement, Council notice

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 shown.  - The approved person cannot be your spouse, partner, relative.  - Upon comparing the copy with the original document, the approved person to be a true copy of the original document.	e or living at the same address as you. oproved person must write on the copy the	
PROOF OF ADDRESS  Choose one of the acceptable forms of proof of address by ser dated within the last 12 months, shows the full residential address.  Utility provider e.g. water, electricity, gas, telecommunication	s (not a PO Box) and displays the Company I	The state of the s

#### **Privacy Statement**

Australian Bank correspondence

Insurance company (car, house, contents)

Insurance company (health, life) (dated within the last 3 months)

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.

Car registration notification/demand

Rental tenancy agreement

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 generate we although the privacy statement and the privacy of the

## Generate KiwiSaver Scheme

### **Trans-Tasman Transfer Form**

#### Statutory Declaration

Declared at (place)

Full Name

Before me (person before whom the declaration is made)

Signature (of person authorised to take declaration)

A statutory declaration made in Australia under the Statutory Declarations Act 1959 must be made before a Judge, a Commissioner of Oaths, a Notary Public, a Justice of the Peace, or any person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding, or before a Commonwealth representative, or before a solicitor of the High Court of 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, or a person authorised to take statutory declaration such as a 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 pros	ecuted if you make a fa	alse declaration.			
Ensure you include your occ	upation. If you, t	the mem	ber, are either retired o	r unemployed please note th	nis in the occupatio	n box. Do i	not leave this field blank
I (full legal name as seen on ID	))						
of (full residential address)							
of (full residential address)							
and (occupation (or unemplo	yed/retired))						
solemnly and sincerely declar  I have permanently emigrate KiwiSaver, my primary resider	ed from New Zeala			n of returning to live in New Zeala	and permanently. I co	nfirm that c	luring my membership witl
Date I left New Zealand (th	is is required)		month/year	to current.			
(If applicable) in the time of n	ny KiwiSaver mem	bership I I	nave also lived outside of N	lew Zealand during these additio	onal period(s):		
From (insert dates)	month / year	to	month / year	From (insert dates)	month / year	to	month / year
From (insert dates)	month/year	to	month / year	From (insert dates)	month / year	to	month/year
Generate to give such infor  I acknowledge that there m tax consequences.  I acknowledge that General in relation to the proposed  I understand that any annu deducted from my withdra  I understand that my withd eligibility to receive governr  I understand that following a  I understand that following a  I understand that my applic accept the transferred funderstand that my applic accept the transferred funderstand that the "New Superannuation is reached I understand that once my regulations governing the A	mation in relation ay be tax consequence te has recomment transfer. all Government of wall amount and remained to the first and remained to the first and remained to the first and sourced (currently 65). Generate Kiwisana Superal	n to this tri quences v anded that ontributi- returned a based u ns. sheme acenerate k to the app ble to be ds by the eme. "" savings ver Scher nnuation	ransfer as requested by rewhen transferring my Kiw t I seek independent and on entitlement I have rect to the Commissioner of upon the unit price(s) at ti count will be closed upo tiwiSaver Scheme savings proval of Generate and th processed if my chosen Australian Superannuati s in my Australian Supera me savings have been tra fund.	ne date my request is processed in my savings being transferred to an Australian superannuation at Generate may request add Australian Superannuation fur on fund, Generate and the Trust nnuation fund will not be able to insferred to Australia, they will lead to the saving of the sa	nuation fund. Superannuation fur ew Zealand tax advir period whilst residin ed and can be affect I to my chosen Austr on fund I will not be ab itional information in nd named in section stee will be released to be accessed until become (with a few	nd, and that ce pertaining outside of ted by mare ralian superple to trans in support of 2 of this application all liable the age of exceptions	t I am liable for any such ng to my circumstances of New Zealand will be ket volatility, PIE tax and rannuation fund. fer them to a third country of this application. oplication does not bilities in respect of my eligibility of New Zealand
			-	e and by the virtue of the Oath		Act 1957.	
Note: Do not complete the f	following section	n until ye	ou are with the person	witnessing your declaration			

On (date)

Occupation