

Lump Sum Contribution 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.

Use this form to make a lump sum contribution to your Generate KiwiSaver account.

Generate KiwiSaver Member Number

Member Details

Full legal name

Date of Birth

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

Residential address

City Country Postcode

Mobile Email

Lump Sum Contribution

☐ I intend to deposit ☐ I have deposited \$ _____ into the scheme bank account.

Please invest this voluntary contribution:

☐ as per my current investment strategy

☐ as per the following combination of funds:

<input type="checkbox"/> CashPlus	%	<input type="checkbox"/> Focused Growth	%
<input type="checkbox"/> Conservative	%	<input type="checkbox"/> Australasian	%
<input type="checkbox"/> Moderate	%	<input type="checkbox"/> Thematic	%
<input type="checkbox"/> Balanced	%	<input type="checkbox"/> Global	%
<input type="checkbox"/> Growth	%	Total (must add to 100%)	100 %

AML / CFT Requirements

We are required to collect additional information relating to the source and/or wealth of funds under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 before we can accept your deposit.

What is your **current occupation**? If you do not work, please state your position, e.g. retired, student, unemployed. **Do not leave this field blank.**

What annual income bracket applies to you?

☐ Under \$30,000 ☐ \$30,000 – \$40,000 ☐ \$40,000 – \$50,000 ☐ \$50,000 – \$60,000
☐ \$60,000 – \$70,000 ☐ \$70,000 – \$80,000 ☐ \$80,000 – \$90,000 ☐ \$90,000 or more

Where do I send my application to?

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

Email return: Please scan this application and all supporting documentation and email them to us at info@generatewealth.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

Lump Sum Contribution Form

Other Requirements

Please select the most appropriate source of these funds.

Please attach evidence of the source of funds and refer to Page 3 for examples of suitable verification of the source of funds.

- | | | |
|---|--|--|
| <input type="checkbox"/> Compensation payment | <input type="checkbox"/> Divorce settlement | <input type="checkbox"/> Gift |
| <input type="checkbox"/> Inheritance | <input type="checkbox"/> Lottery/betting win | <input type="checkbox"/> Money from existing Trust |
| <input type="checkbox"/> Policy claim/maturity | <input type="checkbox"/> Salary/bonus | <input type="checkbox"/> Sale of company |
| <input type="checkbox"/> Sale of investments | <input type="checkbox"/> Sale of property | <input type="checkbox"/> Savings |
| <input type="checkbox"/> Other (please provide details below) | | |
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Acknowledgement

I understand that this voluntary contribution to my KiwiSaver balance will be:

- invested in the investment option(s) I have selected (if applicable); and
- the contributions will be allocated as soon as practicable after receiving this completed form and required supporting evidence.

Signature

If you have signed electronically, please upload your application via the Generate app, or alternatively provide a valid audit trail if you are emailing the application to us.

Date:

D	D	M	M	Y	Y	Y	Y
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Checklist

I have:

- ☐ Completed all sections of the form
- ☐ Provided supporting documents to evidence source of funds / wealth

You may wish to seek advice from a Generate KiwiSaver adviser in choosing your investment strategy.

The information in this form is being collected for the purposes of effectively managing your investment and it will be held by Generate Investment Management Limited. It may be disclosed to third parties to the extent that it is necessary to administer your application and any withdrawals from the Scheme.

You can ask to see the personal information that Generate holds about you by calling us on 0800 855 322.

Source of Funds

Verification of Source of Funds

The following table shows examples of the documents that we may be able to accept as evidence of the source of your funds.

Source of funds	Verification/Evidence (not exhaustive)
Employment (salaries or wages)	One of the following: <ul style="list-style-type: none">Pay slip (or bonus) from the last 3 monthsSigned Employment contractIRD personal tax statementBank statements for the last 3 months*
Inheritance	One of the following: <ul style="list-style-type: none">Solicitor’s statement relating to fundsSolicitor’s letter of undertakingWill AND bank statement evidencing funds deposited*Probate AND bank statement evidencing funds deposited*Letter of administration AND bank statement evidencing funds deposited*Death Certificate AND bank statement evidencing funds deposited*
Insurance payout	Letter from insurer/other party confirming the payout – clearly showing the following: <ul style="list-style-type: none">the organisation logothe date and the amount of the payout
Investment maturity	Investment maturity confirmation clearly showing the following: <ul style="list-style-type: none">the organisation logothe date matured and amount matured AND: Bank statement evidencing funds deposited*
Sale of property	One of the following: <ul style="list-style-type: none">Solicitor’s statement relating to fundsSale and Purchase Agreement signed by all parties AND bank statement evidencing funds deposited*Solicitors letter of undertaking
Savings	<ul style="list-style-type: none">Bank statements for the last 3 months showing amount saved*

*All bank statements must clearly show the name of the account and bank logo

Example template for Bank statement

ABCBANK

Mr John Smith
123 Main Street
Sometown
AUCKLAND 1234
New Zealand

Statement of Account

Account No: 22-1234-0123456-00

Statement Date: 01/11/2025

Statement No: 712

Page: 1 of 2

Transaction Summary

Date	Transaction Detail	Withdrawals	Deposits	Balance
	Opening Balance			\$1,582.76
10 September	XYZ Supermarket	\$369.34		\$1,213.42
11 September	Super Petrol Ltd	\$125.00		\$1,088.42
14 September	Power Co	\$135.22		\$953.20
17 September	Active Lawyers		\$10,000.00	\$10,953.20
22 September	Sorting Goods NZ	\$95.99		\$10,857.21
24 September	Pretty Florists	\$58.25		\$10,798.96
	Closing Balance			\$10,798.96