

## Subsequent Retirement Withdrawal, Amendment and Cancellation 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](mailto:info@generatekiwisaver.co.nz) or phone us on 0800 855 322.

Please use this form if you have already made a retirement withdrawal from your Generate KiwiSaver Scheme account and would like to apply for a subsequent withdrawal, set-up or amend a regular withdrawal facility or cancel a regular withdrawal facility.

Once we receive your completed application, the withdrawal amount specified by you in the form will be paid into your nominated bank account within 5 business days.

### 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 or visit [www.ird.govt.nz/tasks/find-my-ird-number](http://www.ird.govt.nz/tasks/find-my-ird-number)

### Withdrawal Cancellation

I would like to:

Cancel my regular retirement withdrawal (go to Declaration on page 2)

### 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 or change a regular facility to withdraw my savings (minimum withdrawal of \$100).

Start date of regular withdrawal \_\_\_\_\_ Amount \$ \_\_\_\_\_

Frequency  Weekly  Fortnightly  Monthly  Quarterly  Yearly

### 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](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

## Subsequent Retirement Withdrawal, Amendment and Cancellation Form

### Payment Details

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Use bank account details on file from the most recent retirement withdrawal

**If you would like the payment to be made to a different bank account please complete the details below and provide proof of your bank account name and number, ensuring the bank logo is clearly displayed.**

We will only make payments in New Zealand dollars to a New Zealand bank account in your name (held individually or jointly).  
We will not pay to a business bank account.

Account Holder's Name

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Account Number

Bank 

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 Branch 

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Address/PO Box 

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Town/City 

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### Proof of your Bank Account

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New Zealand Bank account in your name

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.

### Declaration

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I confirm that the information given in this form is correct. I am a member of the Generate KiwiSaver Scheme and I am applying to the Trustee to withdraw some or all of my KiwiSaver savings from the Generate KiwiSaver Scheme. If I have opted to withdraw all of my KiwiSaver savings, I understand that on payment of my full account balance, I will no longer be a member of KiwiSaver.

Signature (of member) 

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 On (date) 

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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.