

AML form for someone acting on behalf of another person

Need help with this form? Call us on **0800 855 322**.

We are required to verify your identity for the purposes of the Anti-Money Laundering & Countering Financing of Terrorism Act 2009. We will also require you to complete an AML Identity Verification for an individual form which is available on our website www.generatekiwisaver.co.nz

Use this form if you are acting on behalf of someone else, including in the following circumstances:

- Making a lump sum contribution on behalf of a member of the Scheme
- Making a third party withdrawal application (for example death benefit) from a Member's account

Details of person you are acting on behalf of

Title _____ First Name _____ Surname _____

Scheme Account Number (if known)

Your Personal Details

Title _____ First Name _____ Surname _____

Relationship to person named above _____

Date of Birth | D | D | M | M | Y | Y | Y | Y |

We require you to provide certified copies of documents provided as proof of authority to act on behalf of the above person e.g., grant of probate, letters of administration, birth certificate if you are acting on behalf of a minor

Name of document provided _____

Checklist

I have

- Completed all sections of the form
- Attached a certified copy of proof of authority (e.g. grant of probate, letters of administration, birth certificate if acting on behalf of a minor)

Please send the completed form and documentation to:

Generate KiwiSaver Scheme
Generate Investment Management Limited
PO Box 91609
Victoria Street West
Auckland 1142

Should you have any questions or require any help in completing this form, please call us on 0800 855 322.

The information in this form is being collected for the purposes of meeting our requirements under the Anti-Money Laundering & Countering Financing of Terrorism Act 2009 and it will be held by Generate Investment Management Limited. It may be disclosed to third parties to meet our requirements under the Anti-Money Laundering & Countering Financing of Terrorism Act 2009.

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