

NZ Superannuation Scheme Transfer Form

This is an application to transfer your non KiwiSaver, NZ Superannuation to your Generate KiwiSaver Scheme account. For help completing this form, please phone **0800 855 322**.

Personal Details

Title	First Name	Middle Name
Surname		Preferred First Name
Date of Birth	<input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/> <input type="text" value="Y"/>	IRD No. <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <small>If you don't know your IRD number, please call the IRD on 0800 227 774.</small>
Mobile	Email (important)	

NZ Superannuation Scheme Details

Name of NZ Superannuation Scheme
Name of Provider
Provider Address
Account/Membership/Policy Number
Additional Information

Required Supporting Documents

- A copy of a recent statement from your NZ Superannuation Scheme **or**
- A copy of your NZ Superannuation Scheme Membership Certificate.

Declaration

I, _____ hereby authorise:

Generate Investment Management and its staff to act on my behalf and arrange for the transfer of funds from my NZ Superannuation Scheme to the Generate KiwiSaver Scheme. Please provide them with any information they may require to complete the transfer.

Signature

Date

Where do I send my application to?

Email return: Please scan this application and any 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