

Subsequent Retirement Withdrawal, Amendment and Cancellation Form

If you would like help completing this form, please email 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.

Member Details

Title _____ First Name _____ Surname _____

Date of Birth

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Postal Address _____

City _____ Country _____ Postcode _____

Home Phone _____ Work Phone _____

Mobile _____ Email _____

Generate KiwiSaver Member Number

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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.

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 _____ **Amount \$** _____

Frequency Weekly Fortnightly Monthly Quarterly Yearly

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Payment Details

We will only make payments in New Zealand dollars to a New Zealand bank account in your name (held individually or jointly).

Name of Bank Account

Account Number

Bank

 Branch

Address/PO Box

Town/City

Proof of your Bank Account

Please provide proof of your bank account name and number by supplying any one of the following:

- a pre-coded deposit slip
- a copy of a cheque
- a copy of a bank statement
- an over-the-counter printed receipt with a tellers stamp
- an online bank account statement with the name of the bank in the header/footer

Declaration

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.

Your Signature

 Date

Where do I send my application to?

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