

Trans-Tasman Transfer 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 to transfer your KiwiSaver Scheme savings to a complying Australian Superannuation fund. You are eligible to transfer your KiwiSaver Scheme savings if you have left New Zealand to live permanently overseas and the Australian Superannuation fund you are transferring to accepts transfers from New Zealand KiwiSaver Schemes. If you haven't done so already, please check with your Australian provider that this is the case before completing this form.

Document checklist:

Please complete the checklist below and supply all the relevant supporting documents.

- Completed application form
- Complete Statutory Declaration

We require the following documentation which does not need to be certified:

- A copy of your passport, New Zealand drivers license or firearms license.
- Proof of your Australian Superannuation fund's bank account. It must show the bank account name, bank account number, swift code and logo of the bank.
- A letter from your Australian Superannuation fund confirming that they accept KiwiSaver transfers.
- Evidence of your permanent residence at an Australian address, for example:
 - a copy of a property sale and purchase agreement; or
 - tenancy/leasing agreement for an overseas property; and
 - recent utility bill; or
 - bank statement
- Evidence of your departure from New Zealand, for example:
 - evidence of confirmed travel arrangements; or
 - passport evidence; or
 - evidence of any necessary visas or shipping contracts/documentation; or
 - evidence of Australian employment, i.e. a copy of a contract or letter from your Australian employer; or
 - evidence of your Australian tax status issued by the relevant Australian tax authority.

Member Details

Title _____ First Name _____ Surname _____

Date of Birth

Postal Address _____

City _____ Country _____ Postcode _____

Home Phone _____ Work Phone _____

Mobile _____ Email _____

Generate KiwiSaver Member Number

IRD No.

If you don't know your IRD number, please call the IRD on 0800 227 774.

Prescribed Investor Rate (PIR) (please tick one)

- 10.5%
- 17.5%
- 28%

Note: before processing this transfer, if approved, if any of the tax payment details differ from what we currently have on record, they will be updated based on the new information provided. Please go to www.fisherfunds.co.nz/pircalculator to work out your PIR, however if you have been residing outside of New Zealand for more than 325 days you will be a non-resident for tax purposes and the PIR of 28% will apply.

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Complying Australian Superannuation Fund Details

Member Number _____ Australian Business Number (ABN) _____

Australian Provider Name _____

Postal Address _____

_____ Postcode _____

Phone _____ Email _____

Trans-Tasman Permanent Emigration Transfer Instructions

I have permanently emigrated to Australia and request my KiwiSaver Scheme balance to be transferred to my account in the Australian Superannuation fund named above.

Date you left New Zealand _____

Payment Details

Name of Bank Account _____

Sort Code _____ Swift Code _____

Account Number

Bank _____ Branch _____

Address/PO Box _____

Town/City _____

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Consent and Signature

I agree that Generate Investment Management Limited, the Trustee and any of their respective related entities may collect and use the information set out in (or in connection with) this form for the purpose for which it is provided. We will provide you (on request) with the name and address of any entity to which information has been disclosed. If you do not provide the information required by this form, we may not be able to process your request. You have the right to access all personal information held about you. If any of the information is incorrect, you have the right to have it corrected. The information set out in this form will be collected and held by Generate Investment Management Limited whose address is Level 2, 32 Market Place, Viaduct Harbour, Auckland 1010.

- I understand that any information I give to Generate may be passed on to my chosen Australian Superannuation fund as reasonably required and I authorise Generate to give such information in relation to this transfer as requested by my chosen Australian Superannuation fund.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian Superannuation fund, and that I am liable for any such tax consequences.
- I acknowledge that Generate has recommended that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- I understand that any annual Government contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to the Commissioner of Inland Revenue.
- I understand that my Generate KiwiSaver Scheme account will be closed upon my savings being transferred to my chosen Australian superannuation fund.
- I understand that following a transfer of my Generate KiwiSaver Scheme savings to an Australian superannuation fund I will not be able to transfer them to a third country.
- I understand that my application is subject to the approval of Generate and that Generate may request additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian Superannuation fund named in section 2 of this application does not accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian Superannuation fund, Generate and the Trustee will be released from all liabilities in respect of my membership in the Generate KiwiSaver Scheme.
- I understand that the "New Zealand sourced" savings in my Australian Superannuation fund will not be able to be accessed until the age of eligibility of New Zealand Superannuation is reached (currently 65).
- I understand that once my Generate KiwiSaver Scheme savings have been transferred to Australia, they will become (with a few exceptions) subject to the rules and regulations governing the Australian Superannuation fund.

I confirm that for the period that I have been a member of KiwiSaver, my principal place of residence was New Zealand except for the periods:

_____ to _____ (insert dates)

_____ to _____ (insert dates)

_____ to _____ (insert dates)

Your Signature

Date

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Statutory Declaration

I _____ (full name of person making declaration)

_____ (occupation of person making declaration)

of _____ (address of person making declaration)

solemnly and sincerely declare that:

- I have permanently emigrated from New Zealand to Australia and have no intention of returning to live in New Zealand permanently.
- I have accurately reflected above the dates during which my principal place of residence was not New Zealand.

And I make this solemn declaration conscientiously believing the same to be true and by the virtue of the Oaths and Declarations Act 1957.

Your Signature _____

Declared at _____ Address _____ this _____ Date _____ of _____ Month _____ 20 _____ Year _____

Before me (name, occupation, address and signature of person before whom the declaration is made)

Name _____ Occupation _____

Address _____

Signature _____

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