

## Retirement Withdrawal Form

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 to apply for a retirement withdrawal or set up a regular withdrawal from your KiwiSaver account. This form must be completed no earlier than four weeks from your retirement withdrawal date.

Your KiwiSaver retirement age begins when you turn 65 years of age AND after you have been a member of a KiwiSaver Scheme and/or a Complying Superannuation Fund for five years. You do not have to withdraw all or any of your KiwiSaver savings immediately when you retire and there are many options to help you with your retirement objectives. If you choose to do nothing your savings will continue to be invested as they are currently and you can even continue to add to your account if you wish.

### Document checklist:

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

- Completed withdrawal form.
- Provide proof of your bank account (refer to page 2).
- Provide certified proof of identity (refer to table on page 3 for approved identity documents).
- Provide proof of address (refer to table on page 3 for our requirements).
- Confirm your New Zealand residency on page 3
- Complete the Statutory Declaration on page 4 in front of a Justice of the Peace, Solicitor, Notary Public or other person authorised to take statutory declarations.

### Member Details

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Title \_\_\_\_\_ First 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	O					
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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.

### Privacy Act

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Generate Investment Management Limited, Public Trust, any of their authorised agents, and any distributor assisting with the application (each an "Authorised Person") may collect personal information about the member provided in connection with this application or the Scheme, will (or through MMC New Zealand Limited will) hold the information securely and may use the personal information to manage the member's investment in the Scheme, to communicate with the member or to promote other products and services to the member. The member may ask that he or she be shown the information held about the member, and if any of the information is incorrect, ask for it to be corrected. The addresses for Generate Investment Management Limited and Public Trust are set out in the Generate Product Disclosure Statement.

## Retirement Withdrawal Form

### Your Withdrawal Options

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

**Start Date** \_\_\_\_\_

**Amount \$** \_\_\_\_\_

**Frequency**    Weekly    Fortnightly    Monthly    Quarterly    Yearly

### Payment Details

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

Account Holder's Name \_\_\_\_\_

Account Number  

Bank \_\_\_\_\_ Branch \_\_\_\_\_

Address/PO Box \_\_\_\_\_

Town/City \_\_\_\_\_

### Proof of your Bank Account (mandatory)

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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

## Retirement Withdrawal Form

### Identity and Proof of Address Documents

OPTION 1	OPTION 2
<input type="checkbox"/> Passport; or <input type="checkbox"/> New Zealand Drivers Licence; or <input type="checkbox"/> New Zealand Firearms Licence.	<input type="checkbox"/> Birth Certificate; or <input type="checkbox"/> Citizenship Certificate.

**AND** one of the following:

- HANZ 18+ Card; or
- Tertiary Student Photo ID; or
- Current International Driving Permit; or
- NZ Bank Credit Card with photo.

Choose one of the acceptable forms of **proof of address** for applicant's physical address (not a PO Box) by sending us a copy of an invoice, statement, letter or contract in applicant's name, dated within the **last 12 months**, from one of the following sources:

- Utility provider e.g. water, electricity, gas, telecommunications, Sky TV (or other fixed address media provider)
- New Zealand bank or previous KiwiSaver provider
- Government or local Government agency e.g. IRD, WINZ, Watercare, Council
- Companies Office

If you do not have one of the above forms then please provide copy of an invoice, statement, letter or contract in applicant's name, dated within the **last 3 months**, from one of the following sources:

<input type="checkbox"/> Electronic white pages	<input type="checkbox"/> Electoral roll papers
<input type="checkbox"/> Insurance company	<input type="checkbox"/> Car registration notification/demand
<input type="checkbox"/> Rental tenancy agreement	<input type="checkbox"/> Employer provided accommodation letter
<input type="checkbox"/> Non-bank, non-KiwiSaver financial institution	

### Verification of your Documents

Provide originals or have an approved person certify copies of all ID and proof of address.

**An employee or agent of Generate can verify documents.**

- Certification must be within the last three months.
- The approved person cannot be your spouse, partner, relative or living at the same address as you.
- The approved person could be: an employee or agent of Generate; JP; Chartered Accountant; Lawyer; Police Officer; Registered Teacher; Registered Doctor or any other person who has legal authority to take statutory declarations in New Zealand.
- Upon comparing the copy with the original document, the approved person must write on the copy their name, occupation, their signature, the date and the following, "I certify this to be a true copy of the original document and confirm that it represents the identity of [full name of person being identified]"

### Confirmation of New Zealand Residency

The first time you request a KiwiSaver retirement age withdrawal, you must complete a statutory declaration confirming whether your principal place of residence was New Zealand for the period of your KiwiSaver membership. Going overseas on a holiday, even for several months is not considered a change of principal residence, however if you lived or worked overseas and received KiwiSaver member tax credits, we must refund that portion of the credits back of the Inland Revenue.

- If your principal place of residence was New Zealand for the entire period you have been a member of KiwiSaver please tick here; or
- 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:

Departure Date	Return Date	Location
Departure Date	Return Date	Location
Departure Date	Return Date	Location
Departure Date	Return Date	Location

## Retirement Withdrawal Form

### Statutory Declaration

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I \_\_\_\_\_ (full name of person making declaration)

\_\_\_\_\_ (occupation of person making declaration)

of \_\_\_\_\_ (address of person making declaration)

solemnly and sincerely declare that:

- I am a member of the Generate KiwiSaver Scheme.
- I am applying to withdraw or transfer some or all of my KiwiSaver savings from my Generate KiwiSaver Scheme account. I understand that on full payment of my full account balance, I will no longer be a member of KiwiSaver and my KiwiSaver account cannot be reopened. I agree to release all claims that have been made by me on the Manager and/or Trustee in relation to the Generate KiwiSaver Scheme.
- I understand that my withdrawal value will or might fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my Generate KiwiSaver Scheme account.
- The information given in this form is true and correct. I acknowledge that the Manager and the Trustee of the Generate KiwiSaver Scheme will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against and claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- I understand that the Manager and/or Trustee of the Generate KiwiSaver Scheme will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- I understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant including a government agency or reliable, independent source.
- I have read the privacy statement in this form.

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 \_\_\_\_\_

#### Statutory declaration made in New Zealand

A statutory declaration made in New Zealand under the Oaths and Declarations Act 1957 must be made before a person described in section 9 of that Act including:

- a Justice of the Peace;
- a Barrister and Solicitor of the High Court;
- a Notary Public;
- the Registrar or Deputy Registrar of the High Court or of any District Court;
- a member of Parliament;
- Officers of the Crown or of a local authority within the meaning of the Local Government Act 2002, authorised for that purpose by the Minister of Justice by notice in the *Gazette*; or
- an employee of Public Trust constituted under the Public Trust Act 2001, authorised for that purpose by the Minister of Justice by notice in the *Gazette*.

### Where do I send my application to?

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**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