

ANZ KIWISAVER SCHEME

TRANS-TASMAN TRANSFER APPLICATION FORM

Australia to New Zealand



Post this form and supporting evidence to the trustee of your Australian complying superannuation fund. You may need to visit your Australian provider's website to find their contact details.

1. YOUR INFORMATION

| | |
|---|---|
| Australian fund name | |
| Australian fund membership number | <input type="text"/> |
| ANZ KiwiSaver Scheme investor number | <input type="text"/> |
| IRD number | <input type="text"/> |
| <input type="checkbox"/> Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other | <input type="text"/> |
| First name(s) | |
| Surname | |
| New Zealand residential address | |
| <input type="text"/> | Postcode |
| Contact number | |
| Email | |
| Last known address in Australia | |
| <input type="text"/> | Postcode |
| Date of birth | <input type="text"/> |
| Gender | <input type="checkbox"/> Male <input type="checkbox"/> Female |
| Date of permanent emigration to New Zealand | <input type="text"/> |

2. KIWISAVER SCHEME DETAILS

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|--------------------------------------|--|
| KiwiSaver scheme name | ANZ KiwiSaver Scheme |
| KiwiSaver scheme registration number | KSS10030 |
| KiwiSaver provider name | ANZ New Zealand Investments Limited |
| KiwiSaver provider postal address | PO Box 7149, Victoria Street West, Auckland 1142 |
| KiwiSaver provider email address | service@anzinvestments.co.nz |
| Phone number | +64 9 356 4000 |

Please pay funds into the following Australian dollar bank account:

| | |
|----------------------------|--|
| Bank SWIFT | ANZBNZ22 |
| Bank name and address | ANZ Bank New Zealand Limited, Wellington |
| Beneficiary name | The NZ Guardian Trust Co Ltd as Trustee of ANZ KiwiSaver A/C |
| Beneficiary address | Level 17, ANZ Centre, 23-29 Albert Street, Auckland 1010 |
| Beneficiary account number | 218410AUD00001 |
| Remittance instructions | Member's name and KiwiSaver scheme investor number |

ANZ New Zealand Investments Limited does not accept cheques.

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3. CONFIRMATION OF ACCEPTANCE

ANZ New Zealand Investments Limited ('ANZ Investments'), will accept the withdrawal amount from your Australian complying superannuation fund.

4. CHECKLIST


Make sure you send your Australian complying superannuation fund everything listed below as they can't consider your request without the following. They may also require further information from you.

- Your completed application.
- Your completed statutory declaration signed by you and taken by a person, within the last three months, who can witness Commonwealth statutory declarations (see section 5).
- Evidence that you live permanently in New Zealand, for example, a utility bill in your name issued in the last three months.
- Certified copy of your passport or driver licence. The person who takes your statutory declaration can also certify your identification (a fee may be payable).

Things you need to consider when transferring your superannuation: When you transfer your super, your entitlement under that fund will cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your Australian complying super fund must give it to you. Some of the points you may consider are:

- **Fees** – your transferring fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this application form. The fees could include administration fees as well as exit or withdrawal fees. Your receiving fund may also charge entry or deposit fees on transfer. Differences in the fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your transferring fund may insure you against death, illness or an accident that leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. KiwiSaver schemes do not generally provide insurance of their members, and you will therefore need to seek any insurance you need separately.
- **Tax** – the tax treatment of Australian superannuation schemes and KiwiSaver schemes are different. The ways in which your savings are taxed, and the applicable rates, are different.

We aim to process your trans-tasman transfer and show it in your KiwiSaver account in ANZ Internet Banking and goMoney within 15 business days if you give us all the information we need. If we have to ask for more information, this may cause delays in the processing of your application.

 Call 0800 736 034 (+64 9 356 4000 if overseas) or email service@anzinvestments.co.nz if you have any questions.

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5. STATUTORY DECLARATION

ANZ branch staff can't take statutory declarations. A solicitor, Justice of the Peace or Registrar of a New Zealand Court can take this statutory declaration for you. For more information about who can take statutory declarations, see anz.co.nz/myid.

Dear Australian complying superannuation fund provider

The Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014 was passed on 21 August 2014, allowing Australian superannuation funds to accept a New Zealand statutory declaration as evidence that an individual has permanently emigrated to New Zealand.

ANZ New Zealand Investments Limited has prepared the following New Zealand statutory declaration to help our KiwiSaver members apply to bring their Australian retirement savings to New Zealand.

If you have any questions please contact us at service@anzinvestments.co.nz

Ensure you include your occupation. If you, the member, are either retired or unemployed please note this in the occupation box.

| | | |
|-----|----------------------|--|
| I | <input type="text"/> | (Full name of the person making the declaration) |
| of | <input type="text"/> | Residential address |
| | <input type="text"/> | Postcode |
| and | <input type="text"/> | Occupation |

do solemnly and sincerely declare that:

1. I emigrated permanently to New Zealand as noted in section 1 of this form.
2. My current place of residence in New Zealand is the address noted in section 1 of this form.
3. I have opened a ANZ KiwiSaver Scheme account.
4. I request and consent to a full withdrawal from my Australian complying superannuation fund detailed in section 1 of this form, to be paid to my ANZ KiwiSaver Scheme account.
5. I discharge the trustee of my Australian complying superannuation fund of all further liability in respect of the benefits paid and transferred to my ANZ KiwiSaver Scheme account.
6. I understand that the withdrawal amount from my Australian complying superannuation fund will be paid in Australian dollars and that the exchange rate between Australian and New Zealand dollars at the time my Australian savings are converted will affect the amount that is credited to my ANZ KiwiSaver Scheme account.
7. I am aware I can ask my Australian complying superannuation fund for information about any fees or charges that may apply, or any other information about the effect of this transfer.

AND I MAKE this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957 (New Zealand).

| | | | |
|------------------------|------|--------|----|
| Declared at (location) | this | day of | 20 |
|------------------------|------|--------|----|

Before me: (signature, occupation and address of the person in front of whom the declaration is made)

| | |
|----------------------|----------|
| <input type="text"/> | Postcode |
|----------------------|----------|