

# RETIREMENT WITHDRAWAL APPLICATION FORM

(AUSTRALIAN SOURCED FUNDS ONLY)



The fastest way to provide us your form and supporting documents is to email them to [withdrawals@anzinvestments.co.nz](mailto:withdrawals@anzinvestments.co.nz).

Alternatively you can post them to ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland 1142 or drop them into an ANZ branch.

## 1. YOUR INFORMATION

First name(s)	Surname		
ANZ customer (or investor) number	Date of birth		
Country of birth			
Contact number	Email		
IRD number			
Prescribed investor rate	<input type="checkbox"/> 10.5% <input type="checkbox"/> 17.5% <input type="checkbox"/> 28% (see <a href="http://anz.co.nz/pirupdate">anz.co.nz/pirupdate</a> for help)		

## 2. WITHDRAWAL DETAILS

### 2.1 Amount of withdrawal

I would like to make:  a withdrawal of all my Australian sourced funds  
 a partial withdrawal of \$  deducted proportionately from each fund I invest in.  
(the minimum amount you can withdraw is \$1,000)

### 2.2 Bank account details

We can only pay your withdrawal amount to your New Zealand bank account; we can't pay third parties.

	Bank	Branch	Account number	Suffix
Payment account	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of bank account holder				

If you have listed a non-ANZ bank account, please provide us with a pre-printed deposit slip or bank statement dated within the last six months.

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## 3. IDENTIFICATION

As part of your application, you must provide either verified or certified copies of your valid ID and proof of address.

- **Verified** – An ANZ branch or an ANZ Investments approved financial adviser can check your original ID and proof of address documents. They can submit your application at the same time.
- **Certified** – A Notary Public, Justice of the Peace, NZ lawyer, or any other person who has the legal authority can certify a copy of your ID and proof of address documents by checking them against the originals. You can then send in these certified copies with your application form.

See [anz.co.nz/myid](http://anz.co.nz/myid) for more information.

If we need to ask you for further information, this will delay the processing of your application.

### Identity documents

Please provide us with:

**Option 1: ONE of these documents:**

- New Zealand passport       National ID card  
 Overseas passport (signed)       New Zealand firearms licence

**Option 2: A New Zealand driver licence AND ONE of these documents (must be dated within the last six months):**

- Bank statement (including from ANZ)       Central Government Agency document (issued to you)  
 SuperGold Card       New Zealand Defence or Police Photo ID

**Option 3: ONE form of primary non-photo ID**

- New Zealand full birth certificate       Certificate of New Zealand citizenship  
 Overseas birth certificate       Overseas citizenship certificate

AND

**ONE form of secondary photo ID**

- New Zealand driver licence       New Zealand Defence or Police Photo ID  
 18+ card or Kiwi Access Card

### Proof of address

Please provide us with **ONE** of the below acceptable forms of address. The document must be dated within the last six months and show your name and current New Zealand address.

- Utility bill       Signed rental tenancy agreement, flatting or sub-letting agreement       Short-term accommodation letter issued by the accommodation provider and include your name
- Bank statement or bank document (including from ANZ)       Electoral roll papers       Letter from employer on company letterhead confirming residential address
- Non-bank financial institution statement or document       Electronic White/Yellow Pages       Letter from a lawyer or accountant confirming your residential address
- Central Government Agency document e.g. IRD, ACC       Insurance policy document       Retirement home letter or invoice
- Local Council/Government letter       Car registration notification/demand       Letter or invoice from your general practitioner (GP)
- Educational Institution letter from education facility, must be on letterhead paper

## 4. CHECKLIST

Make sure you send us everything listed below, as we can't consider your request without the following:

- your completed application       certified evidence of your identity (if applicable, see section 3 of this form)  
 certified evidence of your residential address (if applicable, see section 3 of this form)

If you are aged 60-64 and we are still receiving employer or employee contributions for you, you may be required to provide evidence that you are working less than 10 hours per week.

### An example of correctly certified ID



I, James Black

hereby certify that this is a true and correct copy of the original document which I have sighted, and it represents a true likeness of the individual.

Dated the 15<sup>th</sup> day of January 2016

J. Black

Enrolled barrister and solicitor of the High Court of New Zealand

Ensure the 'true likeness' wording is included, that the image of you is clear, and the text can be clearly read.

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## 5. YOUR AGREEMENT

I confirm that:

- I am aged 60 or over, and my employment has come to an end after age 60, or
- I am aged 60 or over and have retired (this means you have stopped working in paid employment, and do not intend to ever again work in paid employment for 10 or more hours per week), or
- I am aged 65 or over.
- I understand that my funds continue to be invested, and may rise or fall in value, until the withdrawal is approved and payment is completed.

Date

## 6. WHAT TO EXPECT NEXT

- Once you've submitted your withdrawal application, you'll receive a text/email confirming it's been received and that we're checking all documents have been provided.
- If we require any additional information or documents we'll contact you using the mobile, email and/or postal address you have provided us.
- Once we have all the documents required we'll begin processing your application.
- If your application is approved we will send you a text/email with a confirmation.
- If the value of your investment reaches zero at anytime, your account will be closed and you will no longer be a member of a KiwiSaver scheme.

## 7. HOW LONG WILL IT TAKE

Once we've received your application, we aim to pay your withdrawal within 15 business days. It may take longer if there are public holidays, or we need to ask you for additional information.

## 8. PRIVACY

You agree we can collect, use and disclose your information to process your application in accordance with our Privacy Statement, which is the same as ANZ Bank New Zealand Limited's and can be found at [anz.co.nz/privacy](http://anz.co.nz/privacy). If you prefer a print version, it is available to download as a PDF or from any branch.

We take your privacy seriously, and understand the need to keep your information confidential and secure. You can access or correct your personal information by calling 0800 736 034 or asking at any ANZ branch. We may charge you a fee to access the information we have about you.

## INTERNAL USE - ANZ STAFF ONLY

I  (staff full name)

hereby verify that this is the original document.

Date

Once completed – staff must scan this form and all required supporting documents in the checklist to [withdrawals@anzinvestments.co.nz](mailto:withdrawals@anzinvestments.co.nz)