

RETIREMENT WITHDRAWAL APPLICATION FORM

(AUSTRALIAN SOURCED FUNDS ONLY)



You can take this completed form into any **ANZ branch**, or post it to **ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141.**

1. YOUR INFORMATION

First name(s)												
Surname												
ANZ customer (or investor) number												
Date of birth	<table border="1"><tr><td>D</td><td>D</td></tr></table>	D	D	<table border="1"><tr><td>M</td><td>M</td></tr></table>	M	M	<table border="1"><tr><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	Y	Y	Y	Y	
D	D											
M	M											
Y	Y	Y	Y									
Country of birth												
Contact number												
Email												
IRD number	<table border="1"><tr><td></td><td></td><td></td></tr></table>				<table border="1"><tr><td></td><td></td><td></td></tr></table>				<table border="1"><tr><td></td><td></td><td></td></tr></table>			
Prescribed investor rate	<input type="checkbox"/> 10.5%	<input type="checkbox"/> 17.5%	<input type="checkbox"/> 28% (see anz.co.nz/pirupdate 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.

Payment account	<table border="1"><tr><td>Bank</td><td>Branch</td><td>Account number</td><td>Suffix</td></tr><tr><td></td><td></td><td></td><td></td></tr></table>	Bank	Branch	Account number	Suffix				
Bank	Branch	Account number	Suffix						
Name of bank account holder									

3. IDENTIFICATION

As part of your application, you must provide certified copies of your ID and proof of address. All photocopied documents must be verified or certified by an authorised person, such as a Justice of the Peace, before sending them to us.

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

Please provide us with either:

- a certified/verified copy of your current passport (page showing your name, date of birth, photograph and signature), or
- a certified/verified copy of your current driver licence showing your name, signature and expiry date and a bank account statement issued **to you** by a registered bank (excluding ANZ), or
- a certified/verified copy of your current firearms licence.

AND one of the following:

- a certified/verified copy of a bank statement issued to you by a registered bank (excluding ANZ) (which can't be more than six months old), or
- a certified/verified copy of your utility bill (which can't be more than six months old), or
- a certified/verified copy of an insurance policy document issued to you (which can't be more than six months old), or
- a certified/verified copy of a Government agency document issued to you (which can't be more than six months old).

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Who can certify your documents?

An ANZ staff member or an ANZ Investments approved financial adviser can verify your ID and proof of address. Alternatively, the following people can certify photocopies of original documents as true and correct copies in New Zealand:

- Notary Public
- Justice of the Peace
- Member of the Police
- New Zealand lawyer
- New Zealand Chartered Accountant
- A person who has legal authority to take statutory declarations (or equivalent) in New Zealand.

If you are overseas: a person who has the authority to take statutory declarations or equivalent in your country.

Please note that the certifier must be at least 16 years of age and cannot be:

- a person involved in the transaction requiring the certification
- related to you
- your spouse or partner
- a person who lives at the same address as you.

Here is an example of what your ID should look like when it's been certified correctly. Ensure the 'true likeness' wording is included.



See anz.co.nz/myid for a full list of acceptable documents and ways documents can be certified or verified. Alternatively, talk to an ANZ staff member or your financial adviser. Remember to include your certified/verified ID and proof of address with your application. Any information missing from your application will cause delays.

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 we are still receiving employer or employee contributions for you, you may be required to provide evidence of an employment ending after the age of 60.

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 and have been a member of a KiwiSaver scheme for at least five years, or
- I am aged 65 or over and I became a member of KiwiSaver as a result of a transfer from a complying superannuation fund and I first became a member of that complying superannuation fund at least five years ago.

Signature

Date

INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

Branch Stamp

Once completed – staff must scan this form and all required supporting documents in the checklist to service@anzinvestments.co.nz