

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			
Date of birth	<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>
	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
	<input type="text" value="Y"/>	<input type="text" value="Y"/>	Country of birth
ANZ customer (or investor) number			
Contact number	Email		
IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>
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.

Payment account

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank	Branch number	Account number	Suffix

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.

# Retirement withdrawal application form

## 3. Identification

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

- **Verified** – An ANZ branch or an ANZ Investments approved financial adviser can check your original ID document(s). 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 document(s) by checking them against the original(s). 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
- 18+ card or Kiwi Access Card
- New Zealand Defence or Police Photo ID

### Example of correctly certified ID



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

## 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)

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.

## Retirement withdrawal application form

### 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

hereby verify that this is the original document

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)

Date