

# RETIREMENT WITHDRAWAL APPLICATION FORM

(AUSTRALIAN SOURCED FUNDS ONLY)



You can email this form and all required supporting documents to [withdrawals@anzinvestments.co.nz](mailto:withdrawals@anzinvestments.co.nz). Alternatively, you can take them to any **ANZ branch**, or post them to **ANZ Investments, Freepost 324, PO Box 7149, Victoria Street West, Auckland 1142**.

## 1. YOUR INFORMATION

First name(s)				Surname								
ANZ customer (or investor) number				Date of birth	D	D	M	M	Y	Y	Y	Y
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	<input type="text"/>			

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 certified or verified copies of your valid ID and proof of address. An ANZ staff member or an ANZ Investments approved financial adviser can verify these documents. Alternatively a Notary Public, Justice of the Peace, NZ lawyer, or other person who has legal authority can certify these documents before sending them to us. 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  Central Government Agency document (issued to you)  
 SuperGold Card  New Zealand Defence or Police Photo ID

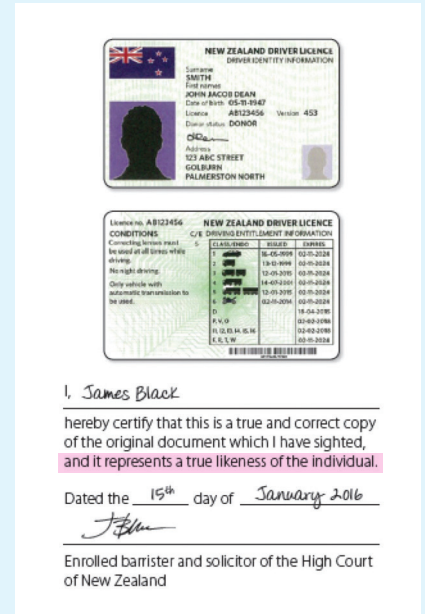
Option 3: ONE form of primary non-photo ID

- 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  
 International Driving Permit  18+ card or Kiwi Access Card



Here is an example of what your ID should look like when it's been certified correctly. Ensure the 'true likeness' wording is included, that the image of you is clear, and the text can be clearly read.

### 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 residential address.

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

## 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.

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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 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.
- I understand that if I am subject to the five-year membership period (i.e. I joined KiwiSaver prior to 1 July 2019 aged between 60 and 64), by making a retirement withdrawal I agree to opt out of the five-year membership period. This means I will no longer be eligible to receive any Government contributions and my employer can stop their contributions.
- 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.

Signature

Date

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## 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.
- We aim to pay your withdrawal 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 withdrawal.
- The payment should be available in your account within three business days of the approval.
- 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. 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

Signature

Branch Stamp

Staff job role

Branch name

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)