

FIRST RETIREMENT WITHDRAWAL

APPLICATION FORM



Use this form to apply for your **first retirement withdrawal**. If you want to make a **subsequent** retirement withdrawal, or amend a regular withdrawal, please complete the [subsequent retirement withdrawal form](#).

We accept applications a maximum of four weeks prior to the date you're eligible to complete a retirement withdrawal, however the processing of your application will not begin until that date has been reached.

You can email this form and all required supporting documents to 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	<input type="text" value="D D"/>	<input type="text" value="M M"/>	<input type="text" value="Y Y Y Y"/>
Country of birth			
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 anz.co.nz/pirupdate for help)

2. WITHDRAWAL AMOUNT

If my application is approved, I would like to make:

a withdrawal of my full available balance

If you withdraw your full balance, your KiwiSaver account will be closed, and you will no longer be a member of a KiwiSaver scheme.

a partial withdrawal of \$

The minimum amount you can withdraw is \$1,000.

a regular withdrawal of \$ starting

and at the following frequency: fortnightly monthly quarterly

Minimum of \$200 a fortnight, \$400 a month or \$1,000 a quarter.

If you have multiple funds and are choosing a partial or regular withdrawal, the withdrawal will be deducted proportionately across each fund you invest in, unless specified otherwise. If you have a specific withdrawal request, please specify the **fund name(s) and dollar amount(s) below**.

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3. BANK ACCOUNT DETAILS

We can only pay your withdrawal amount to you; we can't pay to a third party.

If my application is approved, please pay my withdrawal amount into my New Zealand bank account below:

Bank	Branch	Account number	Suffix
Payment account			

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.

If you'd like your withdrawal amount paid to an overseas bank account, please complete an International Money Transfer (IMT) form available from anz.co.nz/kiwisaverforms

4. 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 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:

- | | |
|---|---|
| <input type="checkbox"/> New Zealand passport | <input type="checkbox"/> National ID card |
| <input type="checkbox"/> Overseas passport (signed) | <input type="checkbox"/> New Zealand firearms licence |

Option 2: A New Zealand driver licence AND

ONE of these documents (must be dated within the last six months):

- | | |
|---|---|
| <input type="checkbox"/> Bank statement | <input type="checkbox"/> Central Government Agency document (issued to you) |
| <input type="checkbox"/> SuperGold Card | <input type="checkbox"/> New Zealand Defence or Police Photo ID |

Option 3: ONE form of primary non-photo ID

- | | |
|---|---|
| <input type="checkbox"/> New Zealand full birth certificate | <input type="checkbox"/> Certificate of New Zealand citizenship |
| <input type="checkbox"/> Overseas birth certificate | <input type="checkbox"/> Overseas citizenship certificate |

AND

ONE form of secondary photo ID

- | | |
|---|---|
| <input type="checkbox"/> New Zealand driver licence | <input type="checkbox"/> New Zealand Defence or Police Photo ID |
| <input type="checkbox"/> International Driving Permit | <input type="checkbox"/> 18+ card or Kiwi Access Card |



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 15th day of January 2016

J. Black

Enrolled barrister and solicitor of the High Court of New Zealand

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.

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

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5. CHECKLIST

Make sure you send us everything listed below, we can only process your application when we have:

- your completed application.
- certified/verified copies of your ID and proof of address.
- your completed statutory declaration signed by you, and witnessed by a person, within the last three months, who is authorised to take statutory declarations (note: if you were aged 65 years or over when you first enrolled in KiwiSaver, you do not need to complete the statutory declaration).

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. AGREEMENT

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.
- If I have multiple funds, and have chosen a partial or a regular withdrawal, the withdrawal will be deducted proportionately across each fund I invest in, unless specified otherwise.
- My funds continue to be invested, and may rise and fall in value, until my withdrawal is approved and the payment is processed.

Signature

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. 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.

Members who joined KiwiSaver prior to turning 65 must also complete the statutory declaration on the following page, and have it witnessed by an authorised person e.g. Solicitor, Justice of the Peace, or a Registrar of a New Zealand Court.

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 withdrawals@anzinvestments.co.nz

You don't need to complete this statutory declaration if you joined KiwiSaver on or after 1 July 2019 and were aged 65 years or over at the time. 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.

1. ELIGIBILITY FOR GOVERNMENT CONTRIBUTIONS

During your KiwiSaver membership, were there any periods when you lived overseas and did not have a permanent residence in New Zealand?

No (continue to section 2) **Yes.** List below the periods when you lived overseas and did not have a permanent residence in New Zealand:

I lived in	<input type="text"/>	from	<input type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>
I lived in	<input type="text"/>	from	<input type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>
I lived in	<input type="text"/>	from	<input type="text"/>	<input type="text"/>	<input type="text"/>	to	<input type="text"/>	<input type="text"/>	<input type="text"/>

To be eligible to withdraw Government contributions you have received during your KiwiSaver membership, you must have had your principal place of residence in New Zealand over that time. Please complete the following question to assess your eligibility.

If you were working overseas as an employee of the New Zealand Government or as a volunteer for certain charitable organisations, you are eligible for Government contributions. If this applies please provide evidence with your application, such as a letter on your employer's letterhead confirming the period you were employed.

2. STATUTORY DECLARATION

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

I (Full name of the person making the declaration)
of Residential address
 Postcode
and Occupation

solemnly and sincerely declare that:

- I understand that if I have not had a principal place of residence in New Zealand during my KiwiSaver membership, I will not be entitled to withdraw any Government contributions received during that period. Any Government contributions claimed on my behalf during any such period will be returned to the Commissioner of Inland Revenue. The information I have provided in section 1 (above) is correct to the best of my knowledge.

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

Signature of the person **making** the declaration (the applicant)

Declared at (location) this day of 20

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

Full name
Address
 Postcode
Occupation
Signature of the person **taking** the declaration