

First retirement withdrawal – Application form

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.

If you wish to fully withdraw from a particular fund, please advise which fund below. For future contributions not to be made to this fund please specify what your new contribution instructions should be.

3. Bank account details

- We can only pay your withdrawal amount to you; we can't pay to a third party.
- If you provide a non-ANZ bank account, please supply a pre-printed deposit slip or bank statement dated within the last six months.

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

Payment account

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

Name of bank account holder

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

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4. Identification

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

- **Verified** – An ANZ branch staff member 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 originals. You can then send in these certified copies with your application form.

See anz.co.nz/myid for more information.

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 (signed) 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

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.
- Your completed statutory declaration, signed by you and witnessed by a person authorised to take statutory declarations within the last three months. (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. 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 for additional information from you or Inland Revenue.

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.

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7. 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.

8. Agreement

I understand that:

- 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.

Note: you must sign below if you have one fund or multiple funds.

Signature

9. 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.

Internal use – ANZ Staff only

Staff full name

Branch stamp

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

Once completed – staff must scan this form and all required supporting documents in the checklist to withdrawals@anz.com

- You don't need to complete this declaration if you were 65 or older when you joined KiwiSaver.
- ANZ branch staff can't take statutory declarations. A solicitor, Justice of the Peace or Notary Public can take this statutory declaration for you. For more information about who can take statutory declarations, see anz.co.nz/myid.
- All of the boxes must be completed. Any errors will require a new declaration – potentially delaying your application.

1. Eligibility for Government contributions

To be eligible to withdraw all of your Government contributions, you must have had your principal place of residence in New Zealand for the duration of 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 the period(s) below:

I lived in	from	D D	M M	Y Y Y Y	to	D D	M M	Y Y Y Y
I lived in	from	D D	M M	Y Y Y Y	to	D D	M M	Y Y Y Y
I lived in	from	D D	M M	Y Y Y Y	to	D D	M M	Y Y Y Y

If you were working overseas as a Government employee or charity volunteer, you may be eligible for Government contributions. Please provide evidence with your application such as a letter from your employer confirming your period of employment.

2. Statutory declaration

I

of

and

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.

<input type="text" value="Signature of the person making the declaration (the applicant)"/>	<input type="text" value="Declared at (location)"/>
	on this date <input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="2 0"/> <input type="text" value="Y Y"/>

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