

RETIREMENT WITHDRAWAL APPLICATION FORM

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).

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:

- 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.

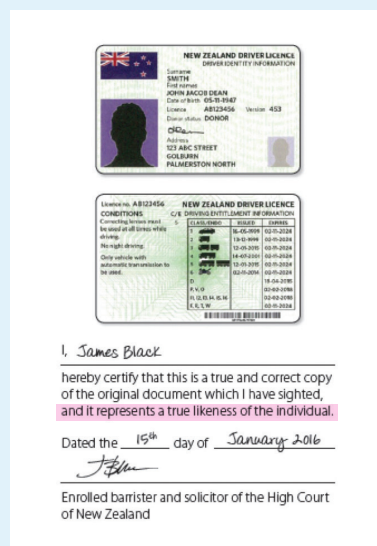
Staying invested? Are you in the right fund?

As your situation changes, your risk profile may change and you may want to review your fund choice. You can:

- complete our risk profile questionnaire at anz.co.nz/riskprofiletool to identify your risk/return profile and which fund is appropriate for you
- seek personalised financial advice from a financial adviser.

Call us on 0800 736 034 (+64 9 356 4000 if overseas) if you'd like to change the fund you're in.

Please note that a KiwiSaver retirement withdrawal can take up to 10 working days to process once we have received all of the required documents. We will contact you to confirm the outcome of your application.



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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 this is your first retirement withdrawal with ANZ (excluding a withdrawal of Australian sourced funds), your original Retirement Withdrawal Statutory Declaration signed by you, and witnessed by a person authorised to take statutory declarations.

5. YOUR AGREEMENT

I understand that if I withdraw my full balance, my employer contributions will stop, my KiwiSaver account will be closed, and I will no longer be a member of KiwiSaver.

Signature

Date

D	D	M	M	2	0	Y	Y
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INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

hereby verify that this is the original document.

Date

D	D	M	M	2	0	Y	Y
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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

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

Full name

ANZ customer (or investor) number

Date of birth

2. ELIGIBILITY FOR GOVERNMENT CONTRIBUTIONS

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.

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 3) Yes. List below the periods when you lived overseas and did not have a permanent residence in New Zealand:

I lived in from to

I lived in from to

I lived in from to

Please note that 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.

3. STATUTORY DECLARATION

I

of

Postcode

and

do 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 same 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 2 (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.

Declared at this day of 20

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

Postcode

Note: 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.