

SUBSEQUENT RETIREMENT WITHDRAWAL APPLICATION FORM



Use this form if you have **previously made a retirement or life-shortening congenital conditions withdrawal**. If you've never made a retirement or life-shortening congenital conditions withdrawal before, please complete the either the first retirement withdrawal form or the life-shortening congenital conditions withdrawal form.

You can take this completed form into any ANZ branch, post it to ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141 or email it to withdrawals@anzinvestments.co.nz

1. YOUR INFORMATION

First name(s)			
Surname			
ANZ customer (or investor) number			
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			
Contact number	<input type="text" value="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

2.1 Setting up a withdrawal

I would like to make:

a withdrawal of my full available balance

If I withdraw my full balance, my KiwiSaver account will be closed, and I 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 **2 0**
and at the following frequency: fortnightly monthly quarterly

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

2.2 Amending an existing regular withdrawal

I would like to amend my existing regular withdrawal instructions to:

a regular withdrawal of \$ starting **2 0**
and at the following frequency: fortnightly monthly quarterly

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

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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.

Please pay my withdrawal amount into my New Zealand bank account below:

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

Name of bank account holder

If you have changed your bank account details since your previous withdrawal, we may require evidence that you're the account holder.

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

4. YOUR AGREEMENT

I understand that:

- a subsequent retirement withdrawal is usually processed and paid to my bank account within five business days of receiving my request. ANZ Investments will contact me to confirm the outcome of my application.
- if I choose a partial or a regular withdrawal, and have multiple funds, the withdrawal will be deducted proportionately from each fund I invest in.
- if I have not made a withdrawal application in the last 12 months, ANZ Investments may request verified/certified copies of my ID and proof of address.
- it is not possible to time my withdrawal request for a specific unit price, the unit price received for my withdrawal request will be the unit price that is available on the business day that my withdrawal request is processed.

Signature

Date

INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

verify that this is the original document.

Date

Signature

Job role

Branch name

Branch Stamp

Once completed – staff must scan this form and all supporting documents in the checklist to withdrawals@anzinvestments.co.nz