

RETIREMENT WITHDRAWAL APPLICATION FORM

(AUSTRALIAN SOURCED FUNDS ONLY)



Post this form to **ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141.**

1. YOUR INFORMATION

First name(s)

Surname

ANZ customer (or investor) number

Date of birth

Country of birth

Contact number

Email

IRD number

Prescribed investor rate

10.5% 17.5% 28% (see anz.co.nz/pirupdate 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.

Payment account

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

Name of bank account holder

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 New Zealand registered bank, or
- a certified/verified copy of your current firearms licence.

AND one of the following:

- a certified/verified copy of your bank statement (which can't be more than three months old), or
- a certified/verified copy of your power bill (which can't be more than three months old), or
- a certified/verified copy of your home phone bill (which can't be more than three months old), or
- a certified/verified copy of your Inland Revenue statement (which can't be more than three months old).

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Who can certify your documents?

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.

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.



Remember to include your certified/verified ID and proof of address with your application. Any information missing from your application will cause delays.

4. 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.

Signature

Date

5. 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.