

RETIREMENT WITHDRAWAL APPLICATION FORM



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	<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			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 DETAILS

If this is your first retirement withdrawal (excluding Australian sourced funds) please complete the attached statutory declaration in full.

2.1 Amount of withdrawal

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

a withdrawal of my full available balance

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 per fortnight, \$400 per month or \$1,000 per quarter).

2.2 Source of withdrawal for partial or regular withdrawals

I would like to make:

- a withdrawal deducted proportionately from each fund I invest in
- a withdrawal from the following funds:

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 if you'd like to change the fund you're in.

2.3 Bank account details

We can only pay your withdrawal amount to your New Zealand bank account; we can't pay third parties.

Bank	Branch	Account number	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Payment account			
Name of bank account holder			

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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).

Who can certify your documents?

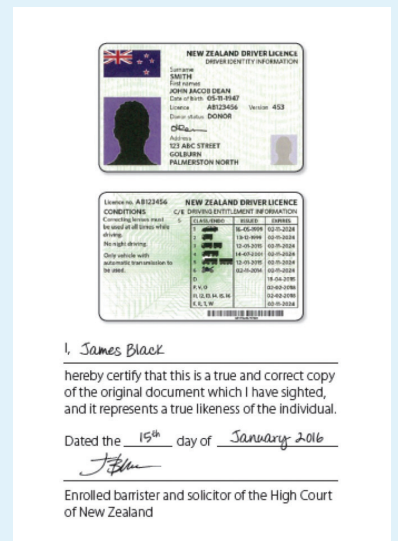
The following people can certify photocopies of original documents as true and correct copies:

- 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 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 or be able to join a KiwiSaver scheme in the future.

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)
- If this is your first retirement withdrawal (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

Please note that a KiwiSaver retirement withdrawal can take up to 10 working days to process. We will contact you to advise if your withdrawal application was successful.

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1. YOUR INFORMATION

Full name

ANZ customer (or investor) number

Date of birth

2. ELIGIBILITY FOR MEMBER TAX CREDITS

To be eligible to withdraw member tax credits 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 member tax credits. 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 Full name of the person making the declaration

of Address

Postcode

and Occupation

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 member tax credits received during that same period. Any member tax credits 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.

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

Declared at 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

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.