

Australian Super Scheme Authorisation Form

If you would like help in completing this form, please email kiwisaver@fisherfunds.co.nz or phone us on **0800 FF KIWI (0800 335 494)**.

Please complete this form to give Fisher Funds authorisation to enquire on your behalf about your Australian Superannuation Scheme transfer. Send this form, alongside your Australian Super Provider form, to:
Fisher Funds Management Limited, Private Bag 93502, Takapuna, Auckland 0740.

If you are applying to transfer your lost or unclaimed Australian superannuation savings, please contact the Australian Tax Office directly on **+61 2 6216 1111** and ask to be transferred to superannuation enquiries.

Section 1: Your Details

Title	First name(s)	
<input type="text"/>	<input type="text"/>	
Surname	Email address	
<input type="text"/>	<input type="text"/>	
Australian Tax File No.*	Contact phone	Date of birth
<input type="text"/>	(<input type="text"/>) <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
IRD number	KiwiSaver Scheme account number	
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Last Australian address		
<input type="text"/>		

**If you do not know your Tax File Number, please call the Australian Tax Office on +61 2 6216 1111 and ask to be transferred to personal tax enquiries. They will ask you for your name, date of birth and a last known address in Australia.*

Section 2: Details of the Australian Superannuation Scheme you are transferring from

Name of Australian Superannuation Scheme	Account / membership / policy number
<input type="text"/>	<input type="text"/>
Name of provider	Approximate Australian Dollar amount to be transferred
<input type="text"/>	\$ <input type="text"/>
Provider address	
<input type="text"/>	

Section 3: Declaration and Authorisation

I understand the potential consequences of transferring my Australian superannuation savings and I have freely made this investment decision having considered the important transfer information detailed under Section 4 on this form. I also understand I have not received personalised financial advice from Fisher Funds in regard to this decision.

I hereby authorise Fisher Funds to use my personal information to make enquiries on my behalf regarding any superannuation savings I may be entitled to. I understand that my personal information may be passed on to the Australian Tax Office, AusFund and providers of superannuation or other entities that may assist in finding any Australian superannuation balances and assisting with withdrawal. I also authorise any entity that Fisher Funds contacts regarding any superannuation to release all information about me and my superannuation to Fisher Funds as my agent and to take instructions from Fisher Funds.

Signature	Date
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Section 4: Important transfer information

There are a number of important things you should consider before making the decision to initiate the transfer:

- Fisher Funds will not charge a fee to transfer your funds, however your Australian provider(s) may charge one. Your Australian provider(s) should notify you of such a fee before you agree to transfer the funds. If we are aware of any such fees, we will inform you also.
- There is no tax to pay on the transferred balance prior to it being invested in your KiwiSaver Scheme account, however once it is invested the balance will be subject to New Zealand tax just like your current KiwiSaver savings are. If you require further information, we recommend that you seek independent advice on taxation from an expert.
- You can also compare the types of funds or assets in which you are able to invest. If you would like help in deciding which investment option may be most suitable for you, please let us know and we will be happy to help.
- Just like any overseas currency, the amount of money you bring back will be affected by the exchange rate at the time you transfer it and any fees the bank may charge to exchange the currency and transfer the funds. You can initiate the transfer at a time that suits you.
- As soon as we make a request on your behalf, your Australian provider(s) may contact you directly to complete the necessary forms or they may send the forms directly to us. We will be in touch with you as soon as we receive the forms.
- Once the completed forms have been provided to your Australian provider(s), they have up to 30 days to transfer the funds. Some providers issue international cheques which can take up to 21 days to clear. We will keep you informed of the progress of your transfer.
- Once you have transferred your superannuation savings to New Zealand you cannot reverse the decision unless you decide to permanently move back to Australia.
- You should ensure you understand all the fees that apply across all of your investments especially between your Australian and New Zealand providers so you can consider whether you are better off consolidating your funds or not.
- You may have benefits linked to your Australian superannuation savings. It always pays to check what (*if any*) benefits you may have and the value of these as you may decide you don't want to give these up.
- Superannuation savings originating from Australia that have been transferred to a New Zealand KiwiSaver account will be available when you have reached age 60 and you satisfy the Australian definition of retirement at that age. You will not be able to access your Australian superannuation savings and use them towards a first home purchase.

This is an important financial decision so take as much time as you need to understand how it will affect you. It may be worthwhile to consult a Financial Adviser to help you understand the risks, benefits and options available to you if you decide to transfer your funds.