

# Australian Superannuation Retirement Withdrawal Form

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

You can complete this form on-screen by typing directly into each field.

Once you have completed this form:

- If you have selected Option 1 as your preferred identification method and the value of your withdrawal is under \$50,000 you can email your completed application to [kiwisaver@fisherfunds.co.nz](mailto:kiwisaver@fisherfunds.co.nz)
- If you have selected Option 2 as your preferred identification method you must post your application and supporting documents to **Fisher Funds Management Limited, Private Bag 93502, Takapuna, Auckland 0740** or send by courier to **Fisher Funds Management Limited, Crown Centre, 67-73 Hurstmere Road, Takapuna, Auckland 0622**.
- If the value of your withdrawal is over \$50,000 you must post or courier your application and supporting documents to us.

## Who should complete this form?

Please use this form to apply for a retirement withdrawal of your Australian sourced retirement savings from your Fisher Funds KiwiSaver Scheme or Fisher Funds TWO KiwiSaver Scheme account ("KiwiSaver account").

You can withdraw your Australian superannuation funds from your KiwiSaver account when you meet the following criteria:

- You have reached the age of 60; and
- Have retired at the date of the withdrawal request.

For the purposes of assessing your eligibility to withdraw your Australian superannuation funds, retirement is defined in Australian regulations as a person who has reached the age of 60 and intends to never again become gainfully employed, either on a full time or part time basis.

You can withdraw the remaining funds in your KiwiSaver account once you've reached the age of 65.

This withdrawal application will be processed once all requirements have been received and you have reached the age of 60.

## Section 1: Your Details

Title  First Name/s

Surname

Date of Birth  /  /  KiwiSaver Account No.  IRD Number

Prescribed Investor Rate (PIR) (please tick one)

10.5%  17.5%  28%

To work out your PIR, or for more information, visit [fisherfunds.co.nz/pircalculator](http://fisherfunds.co.nz/pircalculator) or call us on 0508 347 437.

If your selected PIR differs to the rate we have on file, the change will require 1 business day to update before your withdrawal can be processed. If you do not select a PIR, your withdrawal will be processed at the rate we hold on file for this account.

Address

City  Country  Postcode

Home Phone  ( ) Work Phone  ( ) Mobile  ( )

Email Address

## Section 2: Identification Options

Your withdrawal request must be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

### Option 1 – Electronic identity verification

Fisher Funds has the ability to electronically verify your identity and address. Once we have received your withdrawal request we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification you must have: a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following:

- » New Zealand Passport
- » New Zealand Drivers Licence
- » Australian Passport
- » Australian Drivers Licence

If this method of identification is unsuccessful you will be required to provide certified ID and proof of address.

### Option 2 – Certified copies of identity documents and proof of residential address

Please provide a certified copy of your identity documents and proof of your residential address. Refer to Sections 3 and 4 for information on acceptable identity documents and who can certify them.

**Preferred identification method** — please select one of the following options:

- Option 1 – I would like Fisher Funds to electronically verify my identity
- Option 2 - I would like to provide Fisher Funds with certified copies of my identity documents

## Section 3: Certified Identity Documents

If you selected Option 2 as your preferred way for us to verify your identity please select one of the certified identification options below. If you have selected Option 1 you do not need to provide certified ID now.

**We are only able to accept original certified copies of certified ID (i.e. the copy that has been physically certified). These documents must be posted to us, our postal address is on page 1.**

### OPTION A: (preferred)

Passport (containing name, date of birth, photograph and signature)

OR

New Zealand Firearms Licence

OR

New Zealand Driver Licence (front and back)

### OPTION B:

Full Birth Certificate

AND one of the following

18+ Card/Kiwi Access Card

OR

Overseas Drivers Licence

\* If you are supplying foreign identity documents you must also supply proof of New Zealand residency to enable us to confirm your eligibility to join / have joined KiwiSaver.

**Your photo identification must be current (not expired). If you're unable to provide the above documentation please contact us to discuss other options.**

A Fisher Funds representative can verify your identity documents if you visit our office.

## How to have your ID correctly certified



I certify this to be a true copy of the original document and confirm it represents the identity of Joe Smith.

Name: *Jane Doe*

Occupation: *Justice of the Peace*

Date: *18/08/2020*

Signature: *[Handwritten Signature]*

### Photocopy ID at 150%

So the details are legible.

Please do not send in your physical identity documents e.g. passport, driver's licence, birth certificate etc.

Please note: Certification is valid for three months and must have been carried out within three months of this application.

Your identity documents must be certified by one of the following people: Justice of the Peace, Registered Lawyer, Chartered Accountant, Registered Teacher, Registered Doctor, Police Officer, Notary Public, Registrar/Deputy Registrar.

## Section 4: Proof of Address

If you have selected Option 2 as your preferred identification method please provide proof of your residential address as set out below. Your proof of address doesn't have to be certified. If you selected Option 1 you do not need to provide proof of address.

### Current physical address

Can't be a PO Box number.

**XYZLOGO** **Statement of Accounts**  
Your Account(s) at a glance as at 19 XXXX 2020

**Mr Joe Smith**  
58 Green Street  
Takapuna  
AUCKLAND 1023  
New Zealand

**Today's Statement(s)**

**Tertiary**

Upcoming Automatic Payments

**Dated in the last 12 months, an invoice, statement, letter or contract from:**

- » utility provider e.g. water, power, phone
- » professionals e.g. accountant, doctor
- » service providers e.g. Sky TV, insurance
- » government e.g. IRD, WINZ, rates notice
- » current employer e.g. payslip
- » bank correspondence or statement
- » tenancy agreement

Please note: We cannot accept a statement/correspondence from Fisher Funds as proof of your address.

## Section 5: Your Withdrawal Options

### Full Withdrawal

Withdraw the full value of my Australian superannuation funds

### Partial Withdrawal

Withdraw \$  (minimum withdrawal amount is \$500)

If you are invested in more than one Fund we will withdraw an amount from each Fund in line with the proportion in which you are currently invested in each Fund. Alternatively, please contact us on 0800 FF KIWI (0800 335 494) to discuss how you would like your withdrawal deducted.

## Section 6: Payment Details

We will only make payments in New Zealand dollars to either a New Zealand bank account or an international bank account held in your name either individually or jointly (the cost of an international transfer is paid by the member). Any payment will be adjusted for tax at the notified Prescribed Investor Rate (PIR) on your account.

Name of Account

Account Details

Bank

Branch

Account Number

Suffix

Bank/Branch Address

### Please provide proof of your bank account (one of the following)

- » Bank statement
- » Internet banking screenshot
- » Over the counter receipt with a teller's stamp

The proof of bank account must contain the account name, number and the logo of your bank.

## Section 7: Bankruptcy

Have you ever been adjudicated bankrupt or admitted to a No Asset procedure?

Yes

No (go to Section 8)

If 'Yes', please provide details:

Date

Official Assignee Reference/Case Number

## Section 8: Privacy Statement

Any information that you provide to us may be used by Fisher Funds and the Supervisor and any of their respective related entities, and by other service providers to provide services in relation to your withdrawal request. You have the right to access the information held by us and you may also request that it be corrected.

## Section 9: Statutory Declaration

If you have previously made a partial withdrawal and completed this section, you do not need to complete it again.

A Statutory Declaration is a written statement that allows a person to declare something to be true. This page will need to be completed in front of an authorised person who will witness the declaration.

### Who can witness me making the declaration?

The following people can witness you making the declaration

- Notary Public
- Justice of the Peace
- Enrolled solicitor or barrister of the high court

I,

Name of KiwiSaver member

of

Address

Occupation

### solemnly and sincerely declare that:

- I am applying for a withdrawal of my Australian superannuation funds from my KiwiSaver account.
- I am retired and do not intend to be gainfully employed again on either a full time or part time basis.
- I understand that my withdrawal value may fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my KiwiSaver account.
- The information given in this form is true and correct. I acknowledge that the Manager and the Supervisor will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against and claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- I understand that the Manager and/or Supervisor will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- I understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant.
- I have read the privacy statement in this form.

I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Your Signature

### Declared at

Address

Date

### Before Me

Name

Signature

## Checklist

Please complete the checklist below and supply the relevant documents to support your request.

- Complete Sections 1-5.
- Provide proof of your bank account (*refer to Section 6 for our requirements*).
- Select a preferred identification method in Section 2 and provide evidence (*refer to Sections 2, 3 & 4*).
- Confirm if you have ever been adjudicated bankrupt in Section 7.
- Complete the Statutory Declaration in Section 9 in front of a Justice of the Peace, Solicitor, Notary Public or other person authorised to take statutory declarations.

You can find a Justice of the Peace near you by visiting the New Zealand's Justices' Association website [www.jpfed.org.nz](http://www.jpfed.org.nz) or Yellow Pages [www.yellow.co.nz](http://www.yellow.co.nz). He/she will be able to certify your ID and witness your statutory declaration. You can also call Yellow's Directory Assistance on 018 (*note charges up to about \$1 apply*).

- Provide the original of this completed form (only if you have selected Option 2 as your preferred identification method or the value of your withdrawal is over \$50,000)