



# Westpac KiwiSaver Scheme Permanent Emigration Application Form (Excluding Australia)

June 2017



BT Funds Management (NZ) Limited is the scheme provider and Westpac New Zealand Limited is the distributor of the Westpac KiwiSaver Scheme.

Use this form to apply for a withdrawal from the Westpac KiwiSaver Scheme on grounds of permanent emigration from New Zealand.

Please note that withdrawal of Westpac KiwiSaver Scheme savings in the case of permanent emigration is subject to providing evidence of emigration as detailed in the form and may only be up to the value of your accumulation less the amount of any tax credits.

**Please note that any money transferred from an Australian complying superannuation fund to a KiwiSaver scheme cannot be included in a permanent emigration withdrawal if you are emigrating to a country other than Australia. If you are emigrating to Australia the funds can only be transferred to an Australian complying superannuation scheme.**

Please see the relevant product disclosure statement for more details.

## A. Your Details

Mr  Mrs  Miss  Ms  Other (please specify) \_\_\_\_\_ Date of birth DD / MM / YYYY

First Name \_\_\_\_\_ Surname \_\_\_\_\_

Home Address NUMBER & STREET \_\_\_\_\_ SUBURB \_\_\_\_\_

TOWN/CITY \_\_\_\_\_ POSTCODE \_\_\_\_\_

Postal Address (if different) NUMBER & STREET \_\_\_\_\_ SUBURB \_\_\_\_\_

TOWN/CITY \_\_\_\_\_ POSTCODE \_\_\_\_\_

Phone HOME \_\_\_\_\_ MOBILE \_\_\_\_\_ WORK \_\_\_\_\_

Best time to contact you  Morning  Afternoon  Evening

Occupation \_\_\_\_\_

Email \_\_\_\_\_

IRD number 

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Westpac KiwiSaver Scheme member number 

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Prescribed Investor Rate (PIR\*)  10.5%  17.5%  28% \*Refer to Inland Revenue (ird.govt.nz) to determine your PIR.

## B. Your Withdrawal Request

**According to the KiwiSaver Act 2006, an application for withdrawal may be made where a member permanently emigrates from New Zealand. You may apply for a withdrawal:**

- After a period of one year from the date of permanent emigration from New Zealand, where Westpac KiwiSaver Scheme savings are to be released to you directly.

You are required to complete the statutory declaration contained in Section G of this form.

## C. Permanent Emigration

I confirm that I have permanently emigrated from New Zealand and have been:

a resident in COUNTRY \_\_\_\_\_ since DD / MM / YYYY

## D. Payment Details

Please note we will only make payments to a New Zealand transactional bank account or by New Zealand dollar cheque. I request that you release my Westpac KiwiSaver Scheme savings. Please pay by (tick one):

Depositing to the following account

Account Number 

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Bank Branch Account Number Suffix

Sending a cheque, to the above address.  
(Please note overseas banks can take up to 6 weeks to clear overseas cheques.)

## E. Required Documents

Please provide certified copies of the following:

1. Evidence of emigration from New Zealand (plane ticket and passport page showing your departure or international movement/travel record issued by a government agency).
2. Evidence of current address 12 months after emigration (utility bill, bank statement, rental agreement etc).
3. A certified copy of acceptable identity verification documents. This is usually by way of either a certified copy of a New Zealand passport or New Zealand photo drivers licence. For a full list of acceptable documents, please go to westpac.co.nz/AML.

**Supporting evidence must be signed by a JP, Solicitor or person authorised to take a Statutory Declaration.**

**If the supporting evidence is not in English, a certified translation must be provided.**

**F. Privacy Statement**

I understand that by completing this application form I will be providing personal information about me which will be held securely by the Manager of the Westpac KiwiSaver Scheme. I have the right to access and correct this information subject to the provisions of the Privacy Act 1993.

**G. Acknowledgements and Statutory Declaration**

**Solemnly and sincerely declare that:**

- I have read and understood the Privacy Statement section of this form.
- I wish to withdraw the value of my Westpac KiwiSaver Scheme savings and understand that any tax credits will be deducted and returned to the New Zealand Government.
- I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed.
- I agree that by withdrawing from the Westpac KiwiSaver Scheme I am ending my membership and release all claims that have been made or may be made on Westpac, the Manager and/or the Supervisor in relation to the scheme.
- I solemnly and sincerely declare that the information I have provided in this Westpac KiwiSaver Scheme Permanent Emigration Application Form is true and correct.
- And I make this solemn declaration conscientiously believing the same to be true, and by virtue of the Oaths and Declarations Act 1957.

**Full name**

of ADDRESS

My Signature

**Before me** (JP, solicitor, notary public, or person authorised to take a Statutory Declaration):

**Full name**

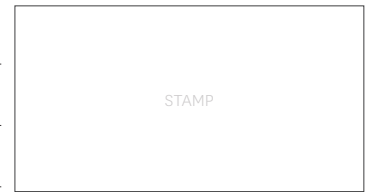
of ADDRESS

occupation

My Signature

Declared at PLACE

Date DD / MM / YYYY



**H. Your Checklist**

**Before sending us the form please check you:**

- Have you re-checked the form and ensured it has been correctly completed?
- Have you signed the Statutory Declaration in Section G?
- Has your witness signed and completed Section G?

**Have you supplied all the required documents:**

- Evidence of emigration from New Zealand (plane ticket and passport page showing your departure)
- Evidence of current address, after 12 months of emigration (utility bill, bank statement, rental agreement etc)
- A certified copy of acceptable identity verification documents. This is usually by way of either a copy of passport page showing your photo or New Zealand photo drivers license.

**Supporting evidence must be supported and signed by a JP, Solicitor or person authorised to take a Statutory Declaration. If the supporting evidence is not in English, a certified translation must be provided.**

If you have any further queries regarding this form, please call our KiwiSaver Specialists internationally on (+64) 9 367 3317 or within New Zealand on **0508 972 254** between **8.30am to 7pm Monday to Thursday; 8.30am to 5pm Friday** (New Zealand time) and we will be happy to help.

Alternatively you can email us at [kiwisaverhelp@westpac.co.nz](mailto:kiwisaverhelp@westpac.co.nz)

Please return the completed form, together with a certified copy of your identification, to: **Westpac KiwiSaver Scheme, PO Box 695, Wellington 6140.**

A Product Disclosure Statement for the Westpac KiwiSaver Scheme is available on our website [westpac.co.nz/kiwisaver](http://westpac.co.nz/kiwisaver) or by calling 0508 972 254.