



Westpac KiwiSaver Scheme Subsequent Retirement Withdrawal Form

May 2016



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

Subsequent Retirement Withdrawal

Use this form if you have previously made a retirement withdrawal from the Westpac KiwiSaver Scheme. If you've never made a retirement withdrawal before you will need to complete the Westpac KiwiSaver Scheme Initial Retirement Withdrawal Form instead. For your first withdrawal we require more information, such as a copy of your ID and a statutory declaration. You can find the Initial Retirement Withdrawal Form online at westpac.co.nz/kiwisaver or at your local Westpac branch.

Australian-sourced Funds

The Subsequent Retirement Withdrawal application does not include the withdrawal of any funds transferred from an Australian complying superannuation scheme ('Australian-sourced Funds') to your Westpac KiwiSaver Scheme account. To withdraw any Australian-sourced Funds, check that you're eligible and complete the Retirement Withdrawal Form for Australian-sourced Funds. You can find this form online at westpac.co.nz/kiwisaver or at your local Westpac branch.

What's Next?

Complete all sections of this form, including the declaration in section E.

- Once completed, take the form into any Westpac branch or post it to:
Westpac KiwiSaver Scheme
PO Box 695
Wellington 6140
- Your withdrawal amount will be paid to the bank account you nominate on this form, generally within 10 business days of your withdrawal request being approved.

Any Questions?

If you need any help completing this form, or would like to discuss your investment options, please call us on **0508 972 254** or **+64 9 367 3317** between 8.30am and 5.30pm Monday to Friday.

A. Your Details

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

Name FIRST MIDDLE LAST

Postal Address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Phone HOME MOBILE

Email

IRD number Westpac KiwiSaver Scheme member number **K** **S**

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

B. Your Withdrawal Request

I would like to make a (please tick):

withdrawal of all my **full available balance**;
(Please be aware that if you withdraw the total balance of your Westpac KiwiSaver Scheme account, your account will be closed and cannot be re-opened - refer to withdrawal information below).

or

lump-sum withdrawal of \$ _____ (minimum of \$500 per withdrawal)

or

regular withdrawal of \$ _____ (these must total a minimum of \$100 per month)

Frequency Weekly Fortnightly Monthly Start date DD / MM / YYYY (allow 10 business days for this to be set up)

For a lump-sum or regular withdrawal please deduct the amount proportionately across each fund that I am invested in.
If you would like to give us specific withdrawal instructions based on your Funds, please specify the dollar amount you would like to withdraw from each fund below

Important information about your withdrawal request:

1. If you withdraw the total balance of your Westpac KiwiSaver Scheme account, this form will be considered as notice to you that your account will be closed and you will no longer be a member of the Westpac KiwiSaver Scheme. Once closed, you cannot re-open or establish a new account with the Westpac KiwiSaver Scheme or another KiwiSaver scheme. This withdrawal request does not include the withdrawal of any Australian-sourced Funds held in your Westpac KiwiSaver Scheme account. To withdraw Australian-sourced Funds you will need to fill in a separate form as described on the previous page.
2. If you're invested in any of the Capital Protection Plan (CPP) Funds, you'll only be able to make a full withdrawal or lump sum withdrawals. **If you choose to make a withdrawal from a CPP Fund before the maturity date for that particular CPP Fund, you'll lose the benefit of any capital protection on the amount withdrawn.**

For Important Information on your Withdrawal Options, please go to westpac.co.nz and search 'KiwiSaver and Retirement'.

