

Westpac KiwiSaver Scheme Retirement Withdrawal Application for Australian-sourced Funds



How do I qualify?

To be eligible for this type of withdrawal, you must:

- Be aged 60 years or over **and**
- Be no longer employed **and**
- Either:
 - have ended your employment after reaching age 60 or
 - have retired and don't intend to ever again be in paid employment again (either on a full time or part time basis).

Important:

If you're aged over 65, use either the Westpac KiwiSaver Scheme **Initial** or **Subsequent** Retirement Withdrawal Form to withdraw any funds, including Australian-sourced Funds. Go to westpac.co.nz/kiwisaver/forms or your local Westpac branch.

What can I withdraw?

- If eligible, you can withdraw some or all of your Australian-sourced Funds. There are no restrictions on the number of lump-sum withdrawals you can make.
- Any positive returns earned on your Australian-sourced Funds since transferring to KiwiSaver are subject to the normal KiwiSaver rules, so will stay in your account until you have reached age 65.

When can I expect payment?

Generally, once we've received your completed application form and all supporting documents, your payment will be made to your nominated bank account within 10 business days of your request being approved. We'll let you know the outcome of your withdrawal request.

How do I apply?

1. Complete all sections of this form.
2. Review 'Your checklist' to ensure you have everything you need.
3. Once completed, send us your form and supporting documents to:

Courier: Westpac KiwiSaver Scheme, Level 4 Cityside, Westpac on Takutai Square, 53 Galway Street, Auckland, 1010

Post: Westpac KiwiSaver Scheme, PO Box 934 Auckland, 1140

Visit: Any Westpac branch

Your checklist

Please ensure that you provide us with all of the following:

- Your fully completed application form.
- Certified copy or original bank statement/deposit slip, if the bank account you've provided is not a Westpac New Zealand bank account.
- Certified copy of acceptable identity documentation (such as the photo and signature pages of your current signed passport, or both sides of your current New Zealand driver licence).
- Certified copy of proof of address showing your name (such as a recent rates, power or phone bill). This can't be from Westpac and must be dated within 12 months of your application.

Documents must be received by Westpac within 3 months of being certified. For a full list of acceptable identification and proof of address, go to westpac.co.nz/AML

What's a certified copy?

A certified copy is a copy of an original document on which an authorised person (such as a Justice of the Peace, solicitor or other legally authorised person) has confirmed it is a true copy of the original. All certified copies must include:

- The certifier's name, occupation, signature and date.
- The following or equivalent wording: "I certify this to be a true copy of the original document as sighted by me on [date]"
- For identity documents only, add: "and it represents the true likeness and identity of the individual"

The certifier can't be: someone you're related to, your spouse/partner, or someone who lives at the same address.

Need help?

If you need help completing this form or would like an update on your application, call **0508 972 254 (+64 9 375 9978 from overseas)** weekdays between 8.30am and 5pm. Alternatively, email us at kiwisaverhelp@westpac.co.nz

Westpac branch use – branch checklist Branch name

Staff name

- Form is complete Customer is AML compliant, current ID and proof of address has been verified/certified and loaded into Sales Customer (Assist)

Your details

We'll update your address and PIR details if they differ from our records. We won't update your phone and/or email details unless we have none on file or you tick the box below:

Update my details: update my phone number and/or email details so all future Westpac KiwiSaver Scheme and general Westpac correspondence goes to the below:

Mr Mrs Miss Ms Other (please specify) Date of birth

Name

Physical address

Postal address (if different)

Phone

Email

IRD number

Westpac KiwiSaver Scheme member number Find it in online banking or on your statement.

Prescribed Investor Rate (PIR) 10.5% 17.5% 28%. Find yours at ird.govt.nz/pir

Email is our preferred way to contact you as it's a faster way to communicate with you.

Your withdrawal request

I would like to (please tick only one):

Withdraw all my Australian-sourced Funds. If you select this option, then if your balance is zero when your withdrawal is complete, your account will be closed and you'll no longer be a member of the Westpac KiwiSaver Scheme.

Partially withdraw some of my Australian-sourced Funds \$ (minimum of \$500 per withdrawal)

If you're invested in more than one fund, the withdrawal will be deducted proportionately across each of the funds you're invested in. If you'd like the withdrawal to be deducted differently, please specify the dollar amount you'd like to withdraw from each fund below.

Your payment details

Please provide us with a New Zealand bank account that is either solely or jointly held in your name (i.e. not a Trust account or business account). If approved, the withdrawal will be paid to your nominated account. If the bank account below is not a Westpac New Zealand bank account, you'll need to supply a certified copy or original bank statement/deposit slip.

Account holder's name

Account number

Privacy statement

The personal information which you provide in (or in connection with) this form will be held securely by BT Funds Management (NZ) Limited (Manager) and/or The New Zealand Guardian Trust Company Limited (Supervisor), at the address of the Manager and/or Trustees Executors Limited (the registry provider), and may also be disclosed to Westpac Banking Corporation ABN 33 007 457 141 (Westpac), Westpac New Zealand Limited (Westpac NZ) and any other entity that is involved in the administration and management of the Westpac KiwiSaver Scheme (including Inland Revenue and any regulatory body). You have the right to access and correct this information subject to the provisions of the Privacy Act 2020. Your personal information may otherwise be collected, used and disclosed in accordance with Westpac NZ's Privacy Policy (available at westpac.co.nz/privacy).

Your declaration

PLEASE PRINT THIS FORM AND SIGN THIS SECTION

I declare that:

- I have read and understood the Privacy Statement above.
- All the information provided in this form, and any included materials, is true and complete.
- I understand that if the information in my application is incomplete or incorrect, the Manager of the Westpac KiwiSaver Scheme will not be able to complete its assessment of my application.
- I have met the eligibility criteria to withdraw my Australian-sourced Funds listed in the 'How do I qualify?' section.
- I understand that my withdrawal value will be based on the unit price(s) applying at the date that my withdrawal request is processed, so may be subject to change. It can be affected by market volatility, PIE tax rebates or deductions.

My signature

Date DD / MM / YYYY