

Westpac KiwiSaver Scheme Transfer to a Complying Australian Super Fund



How do I qualify?

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

Have permanently emigrated to Australia.

Important:

If you've permanently emigrated to a country that's not Australia, use the Westpac KiwiSaver Scheme Permanent Emigration application form – go to westpac.co.nz/kiwisaver/forms or any Westpac New Zealand branch.

What can I transfer?

If approved, the full available balance of your Westpac KiwiSaver Scheme account will be transferred to your Australian Super Fund.

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 Australian Super Fund 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, New Zealand

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

Visit: Any Westpac New Zealand branch

Need help?

If you're not sure whether you qualify, 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 NZ time. Alternatively, email us at kiwisaverhelp@westpac.co.nz

Your checklist

Please ensure that you provide us with all the following:

- Your fully completed application form.
- Check your statutory declaration has been completed, signed and witnessed by a person authorised to take statutory declarations.
- Evidence of emigration from New Zealand, such as a plane ticket, passport page(s) showing your departure or an international movements/travel record issued by a government agency. In New Zealand, a travel movements record can be obtained from the New Zealand Customs Office at: customs.govt.nz/about-us/travel-movements-request
- A letter from your Australian superannuation provider on their letterhead, including the information listed in 'Your Australian Superannuation Fund details' on page 2 of this form.
- 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 in Australia showing your name (such as a recent rates, power or phone bill). This can't be from Westpac New Zealand and must be dated within 12 months of your application.

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.

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 Australian Superannuation Fund details

I would like my funds paid into my complying Australian Superannuation Fund below:

Australian super fund name

Australian super fund's Australian Business Number (ABN)

Your Australian super fund member or account number

To process your transfer, please include in your application a letter from your Australian superannuation provider (on their letterhead), confirming:

1. They are a complying super fund regulated by the Australian Prudential Regulation Authority (APRA).
2. They are willing to accept a transfer payment from a KiwiSaver scheme into your account in the fund.
3. The bank details to be used for the transfer payment, including any reference details needed.

Note, since we'll be making an international payment via Telegraphic Transfer, the following will apply:

- Westpac Banking Corporation (New Zealand branch) is the Westpac provider of international payments and charges a fee of NZD15.00.
- Payment and handling charges and commissions are also often levied by other overseas intermediary and beneficiary banks. These charges will be deducted from the international payment and therefore will decrease the amount received in the beneficiary account.
- Transmission of funds will occur after a withdrawal has been approved. Westpac can give no general assurances on the timing of receipt of the funds by the beneficiary.
- For the full terms and conditions for international payments please see International Payments in the Westpac General Terms and Conditions at westpac.co.nz/general-terms-conditions

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 Manager's address, and may 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's Privacy Policy (available at westpac.co.nz/privacy).

Statutory declaration

PLEASE PRINT THIS FORM AND SIGN AND DATE THE STATUTORY DECLARATION IN **FRONT** OF YOUR WITNESS.

1. Eligibility to withdraw government contributions

For any period(s) during your KiwiSaver membership when New Zealand was not your principal place of residence, any government contributions claimed on your behalf will be deducted from your withdrawal amount and returned to Inland Revenue.*

During your KiwiSaver membership, were there any periods when you lived overseas and were not a permanent resident in New Zealand?
(Please tick only one.)

- No (continue to the 'Your statutory declaration' section below)
- Yes (please list below, excluding any overseas holidays where you remained a New Zealand resident, then continue to the 'Your statutory declaration' below.)

I lived in	<input type="text"/>	from	Date DD / MM / YYYY to Date DD / MM / YYYY
I lived in	<input type="text"/>	from	Date DD / MM / YYYY to Date DD / MM / YYYY
I lived in	<input type="text"/>	from	Date DD / MM / YYYY to Date DD / MM / YYYY

*If you were working overseas as a government employee or as a charity volunteer, you may still be eligible for government contributions. Please provide evidence with your application, such as a letter from your employer confirming the period you were employed.

2. Your statutory declaration

Your statutory declaration must be completed and signed in front of a Justice of the Peace, a solicitor, or other person authorised to witness a statutory declaration. Westpac staff cannot witness this statutory declaration.

If you are in Australia, please choose someone from the list below to witness the statutory declaration:

- Judge
- Commissioner of Oaths
- Notary Public
- Justice of the Peace
- Any other person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding
- Commonwealth representative at an embassy
- Solicitor of the High Court of New Zealand

I NAME	OCCUPATION
of ADDRESS	

Solemnly and sincerely declare that:

- I have read and understood the Privacy Statement.
- 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 permanently emigrated from New Zealand to Australia.
- I have permanently resided in New Zealand for the full duration of my KiwiSaver membership, other than the periods (if any) listed in the 'Eligibility to withdraw government contributions' 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, additional contributions received and eligibility to receive government contributions.
- I understand that the exchange rate prevailing when my transfer is made will apply (foreign exchange fees may also apply). I acknowledge that Westpac has no liability for any losses suffered as a result of converting currencies and that I am responsible for any exchange risks from the conversion of currencies.
- I understand that, once transferred, my KiwiSaver savings will become (with a few exceptions) subject to rules governing Australian complying superannuation funds. I will not be able to access my transferred KiwiSaver savings in my Australian complying superannuation fund until I reach the age of eligibility for New Zealand Superannuation (currently age 65), and I will not be able to transfer my KiwiSaver savings to a third country.
- I agree that by transferring to a complying Australian superannuation fund my account will be closed and I will no longer be a member of the Westpac KiwiSaver Scheme.

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

My signature	Declared at TOWN/CITY	Date DD / MM / YYYY
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Before me (a person authorised to take a statutory declaration in accordance with the New Zealand Oaths and Declarations Act 1957 - see above for further information):

Signature of witness	STAMP
Name of witness	
Declared at TOWN/CITY Occupation Date DD / MM / YYYY	