

# Westpac KiwiSaver Scheme Transfer to a Complying Australian Super Fund



April 2021.

## A. Your details

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

Name FIRST MIDDLE LAST

Physical address NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Postal address (if different) NUMBER & STREET SUBURB

TOWN/CITY POSTCODE

Phone HOME MOBILE BUSINESS

Occupation

Email

IRD number 

--	--	--	--	--	--	--	--	--	--

Westpac KiwiSaver Scheme member number 

K	S								
---	---	--	--	--	--	--	--	--	--

## B. Australian Superannuation Fund details

Fund name/provider

Fund's Australian Business Number (ABN)

Your Australian super fund member number/identifier

Please note: in order to process your transfer, we'll need to receive a letter from your Australian superannuation provider, on their letterhead, confirming:

- that they are a complying super fund regulated by the Australian Prudential Regulation Authority (APRA)
- that they are willing to accept a transfer payment from a KiwiSaver scheme into your account in the fund; and
- the bank details to be used for the transfer payment (including any reference details needed).

Please attach the original letter to this application form.

## C. 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 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. This information will be used now and in the future to provide you with information on the full range of financial services offered by Westpac NZ and/or any entity within the Westpac group, and may be used to update any other information about you held by any member of the Westpac" group.

**D. Acknowledgements and statutory declaration**

I (full name) \_\_\_\_\_

of (address) \_\_\_\_\_ and (occupation) \_\_\_\_\_

**Solemnly and sincerely declare that:**

- I have permanently emigrated from New Zealand to Australia.
- New Zealand has been my principal place of residence from the date I joined a KiwiSaver scheme, except for the periods specified below:
- I understand that my transfer value will be based upon the unit price(s) at the date my request is processed, and the exchange rate prevailing when my transfer is made (foreign exchange fees may apply). I acknowledge that Westpac has no liability for any losses suffered as a result of it 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. In particular, I understand that 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 from the Westpac KiwiSaver Scheme, I am ending my membership and release all claims that have been made or may be made on BT Funds Management (NZ) Limited, Westpac New Zealand Limited, and/or New Zealand Guardian Trust (the Supervisor in relation to the Westpac KiwiSaver Scheme).

Start Date	End Date
DD / MM / YYYY	DD / MM / YYYY
DD / MM / YYYY	DD / MM / YYYY

**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 \_\_\_\_\_ Date DD / MM / YYYY

Declared at PLACE \_\_\_\_\_

**Before me** (JP, solicitor, notary public, or other person authorised to take a Statutory Declaration - see below for further information):

I (full name) \_\_\_\_\_

of (address) \_\_\_\_\_ and (occupation) \_\_\_\_\_

My signature \_\_\_\_\_

Date DD / MM / YYYY \_\_\_\_\_

Declared at PLACE \_\_\_\_\_



Below are people who can take your statutory declarations and justify your documents in a commonwealth country outside New Zealand.

**Commonwealth country:**

- 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.

---

## E. 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 D?
- Has your witness signed and completed Section D?

### Please attach:

- A **certified copy** of your identification. This is usually by way of either a certified copy of a New Zealand pass port or New Zealand driver license.
- A **certified copy** of evidence of your address in Australia. Evidence of address must not be a Westpac issued document and can include a rates, power or phone bill.
- Evidence of emigration from New Zealand, such as a plane ticket, flight itinerary or stamp in passport.
- Original letter from your Australian superannuation fund confirming that they are willing to accept a transfer payment from a KiwiSaver scheme into your account in the fund, and the bank details to be used for the transfer payment (including any reference details needed).

For a full list of acceptable documents, please go to [westpac.co.nz/AML](http://westpac.co.nz/AML)

---

Please call us on **0508 972 254** or **+64 9 375 9978** if you are calling from overseas between 8.30am and 5.00pm Monday to Friday, if you need help completing this form. Please return the completed form to

### By courier

Westpac KiwiSaver Scheme  
Level 4 Cityside  
Westpac on Takutai Square  
53 Galway Street, Auckland, New Zealand.

### Or by post

Westpac KiwiSaver Scheme  
PO Box 934  
Auckland 1140, New Zealand.