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### NZ Funds KiwiSaver Scheme

# Application for Withdrawal First Home Purchase

Use this form to apply for a first home withdrawal from your NZ Funds KiwiSaver Scheme account. We will also require you to complete an identity verification form, AML Form for an Individual (Form 1), which is available on our website www.nzfunds.co.nz > KiwiSaver > Documents > Member Forms. Send by standard post to: NZ Funds KiwiSaver Scheme, Private Bag 92050, Victoria Street West, Auckland 1142, or by email to nzfkiwi@linkmarketservices.com.

Send by courier mail to: PWC Tower, Level 30, 15 Customs Street West, Auckland 1010.

### 1. Introduction and steps to apply

Note that to be eligible to apply to withdraw funds to purchase your first home you need to have been a member of a KiwiSaver scheme (or complying superannuation fund) for at least three years and not have already made a first home withdrawal from the NZ Funds KiwiSaver Scheme or another KiwiSaver scheme.

The withdrawal is subject to approval and you must leave a minimum of \$1,000 in your KiwiSaver account after making the withdrawal.

To apply for a first home withdrawal:

- Find a solicitor or licensed conveyancer to help you through all the legal ins and outs of buying your first home. Let your solicitor or licensed conveyancer know you want to use your KiwiSaver savings towards your first home.
- 2. Talk to us about applying for a first home withdrawal. You can call us on 0800 NZF KIWI (0800 693 5494).
- 3. Take this application form to your solicitor or licensed conveyancer to complete and return with:
  - your sale and purchase agreement
  - a solicitor's or licensed conveyancer's letter of undertaking (attached at the back of this application form)
  - a solicitor's or licensed conveyancer's deposit slip for their trust account.

All documents need to be with us at least 10 working days before you require the funds to be paid to your solicitor or licensed conveyancer (either to pay a deposit or to pay the vendor on the settlement date).

4. The amount you are able to withdraw from your KiwiSaver account will be paid directly to your solicitor's or licensed conveyancer's trust account. You and your solicitor or licensed conveyancer will receive confirmation of this.

Return the completed form to NZ Funds KiwiSaver Scheme, Private Bag 92050, Victoria Street West, Auckland 1142, or by email to nzfkiwi@linkmarketservices.com.

If you have any questions about completing this form, please call us on 0800 NZF KIWI (0800 693 5494).

# 2. Your personal details

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# 4. Your statutory declaration

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# 5. Your solicitor's or licensed conveyancer's details

Name															
Postal address															
Street															
Suburb	Town / City			Postcode											
Suburb	Town / City			Fosicode											
Phone number															
Thore number															
Email															
5. Checklist															
I have:															
completed sections 2, 3, 4 and 5															
signed section 4 (in the presence of a person a	uthorised to take a	statutory declarat	ion)												
l attach:															
a Letter of Undertaking completed by my solic	itor or licensed conv	eyancer (attache	d at the back of t	his applicat	ion form)										
a pre-printed bank deposit slip from my solicit	or or licensed conve	eyancer's trust acc	count												
a copy of the Agreement for Sale and Purchase	of Real Estate for the	he property I am բ	ourchasing												
a completed AML Form and certified identity d	locuments (e.g., pas	sport, utility bill)													
if I am a previous property owner, a confirmation	on letter from Kainga	a Ora that I qualify	for a first home	withdrawal.											

# Letter of Undertaking (where all funds are to be paid at settlement)

To: the Manager of the NZ Funds KiwiSaver Scheme (the Scheme):

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# Undertaking

We undertake to you that:

- 1. as at the date of this letter, any conditions to the Agreement are fulfilled or waived and the Vendor and the purchaser(s) are unconditionally obliged to settle; and
- 2. any funds received by us pursuant to the Application (the Funds) will be paid, to or as instructed by the Vendor, as part of the purchase price; or
- 3. if settlement under the Agreement is not completed by the due date in the Agreement or any agreed extended date, the Funds will be repaid to you as soon as practicable on account of the Member, with no deductions or disbursements.

I confirm that I hold a current practising certificate issued pursuant	to the La	awyers	and Cor	nveyar	ncers A	ct 2006	S.				
Signature	Day		Month		Year						
Name											
Company/practice name											
Phone number											
Email											

# Letter of Undertaking

# (where funds to be applied for deposit and any remainder paid at settlement)

To: the Manager of the NZ Funds KiwiSaver Scheme (the Scheme):

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## Undertaking

We undertake to you that:

- 1. as at the date of this letter, the Agreement remains subject to a condition or conditions which have yet to be either fulfilled or waived (ie, the Vendor and the Purchaser(s) are not yet contractually obliged to settle);
- 2. such funds as are received by us pursuant to the Application and are to be applied towards paying a deposit under the Agreement (the **Deposit Funds**) will be held by a stakeholder who is obliged to:
  - i. hold the Deposit Funds while the Agreement is conditional; and
  - ii. repay the Deposit Funds to us if settlement under the Agreement is not completed by the due date in the Agreement or any agreed extended date (except where non-completion of settlement is due to the Member's default).
- 3. we will repay to you as soon as practicable on account of the Member (with no further deductions or disbursements) any Deposit Funds that the stakeholder repays to us if settlement is not completed; and
- 4. any funds received by us pursuant to the Application which exceed the amount to be applied towards paying a deposit under the Agreement:
  - i. will be paid to the Vendor as part of the purchase price on settlement of the Agreement; or
  - ii. if settlement under the Agreement is not completed by the due date in the Agreement or any agreed extended date, will be repaid to you as soon as practicable on account of the Member with no deductions or disbursements.

The undertakings in paragraphs 2 and 3 above are restricted to confirming that the stakeholder owes obligations:

- to hold the Deposit Funds while the Agreement is conditional; and
- to repay the Deposit Funds to us if settlement of the Agreement is not completed as described.

We give no undertaking that the stakeholder will actually comply with these obligations, and accordingly we accept no liability in the event that the stakeholder breaches either obligation.

I confirm that I hold a current practising certificate issued pursuant to the Lawyers and Conveyancers Act 2006.														
Signature	Day		Month		Year									
Name														
Company/practice name														
Phone number														
Email	_													