



Application for Transfer
to an Australian Superannuation Fund

Use this form to apply for a transfer of your KiwiSaver savings if you have permanently emigrated to Australia. You will be eligible to transfer your KiwiSaver savings to an Australian complying superannuation fund if you have left New Zealand to live permanently in Australia and the Australian complying superannuation fund you are transferring to accepts your transfer.

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.

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

1. Your personal details

Member number										IRD number											
N	Z	F																			
Name																					
Title		First name						Middle name(s)						Surname							
Date of birth																					
Day		Month				Year															
Residential address (not PO box)																					
Street																					
Suburb										Town / City										Postcode	
Postal address (if different)																					
Street / PO Box																					
Suburb										Town / City										Postcode	
Phone number(s)																					
Mobile										Home										Business	
Email																					
If you supply an email address, we will send you information relating to your investment by electronic means. We suggest using your personal rather than work email address as this is less likely to change over time.																					
☐ No email																					

2. Australian complying superannuation fund details

To be completed by the member

Australian tax file number

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

(if unknown, please visit the Australian Taxation Office website at www.ato.gov.au or by phone on +61 6216 1111)

Australian Business Number (ABN)

[illegible]

Account/membership number

Superannuation Product Identification Number

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

Australian superannuation provider name

Australian superannuation fund name

Postal address

Street / PO Box

Suburb

Town / City

Postcode

--	--	--

Phone number

Email

Note

In order to process your transfer we will need to receive a letter from your Australian superannuation provider, on their letterhead, confirming:

- that they are willing to accept a transfer payment from a KiwiSaver scheme into your member 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.

Have you transferred money from a UK Pension Scheme after 5 April 2006?

☐ Yes ☐ No

If you have transferred money from a UK pension scheme, we strongly recommend you seek independent tax advice before applying to transfer your funds to an Australian complying superannuation fund as it could result in tax obligations in the UK.

3. Acknowledgement and statutory declaration

I apply to the Manager of the Scheme to withdraw the balance of my KiwiSaver account and understand that:

- a withdrawal of my KiwiSaver account balance in the case of permanent emigration is subject to the Manager's approval; and
- before my application is approved I am required to:
 - complete the statutory declaration below;
 - provide proof of the date I left New Zealand (e.g. copies of airline tickets, passport, other documentation showing departure); and
 - provide evidence of my residential address in Australia (e.g. utility bill, bank statement, etc).
- I understand the information provided in connection with this form will be used by the Manager, the Administration Manager and the Trustee (including their related entities) to process my transfer request (and may be disclosed for these purposes to third parties where relevant, including my Authorised Financial Adviser, Inland Revenue or other government agency). I acknowledge I have the right to access and correct this information subject to the provisions of the Privacy Act 1993.
- I understand that any information I give to the Manager may be passed on to my chosen Australian superannuation fund as reasonably required and I authorise the Manager to give such information in relation to this transfer as is requested by my chosen Australian superannuation fund.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian superannuation fund, and that I am liable for any such tax consequences. I acknowledge that the Manager has recommended that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- 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 understand that my NZ Funds KiwiSaver Scheme account will be closed upon my NZ Funds KiwiSaver Scheme savings being transferred to my chosen Australian superannuation fund.
- I understand that following a transfer of my KiwiSaver savings to an Australian superannuation fund, I will not be able to transfer them to a third country.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation fund named in Section 3 of this application cannot accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian superannuation fund, the Manager of the NZ Funds KiwiSaver Scheme will be released from all liabilities in respect of my membership in the NZ Funds KiwiSaver Scheme.
- I understand that the 'New Zealand sourced' savings in my Australian superannuation fund will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (currently 65).
- I understand that once my NZ Funds KiwiSaver Scheme savings have been transferred to Australia, they will become (with a few exceptions) subject to the standard rules and regulations governing the Australian superannuation fund.

I solemnly and sincerely declare that:

I emigrated from New Zealand on

Day Month Year

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

and have been a resident in Australia since

Day Month Year

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

and

☐

I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver;

OR

☐

I was living overseas from

Day Month Year

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

to

Day Month Year

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

and I understand I do not qualify to be paid the member tax credit for this period.

3. Acknowledgement and statutory declaration (continued)

All information provided by me in (or in connection with) this application is true and correct.

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

Signature

Signature of member

Day

Month

Year

Declared at (location)

Before me

(Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration under the Oaths and Declarations Act 1957)

Name

Signature

Occupation

Insert stamp here

Checklist

I have:

- ☐ completed sections 1, 2 and 3
- ☐ signed section 3 (in the presence of a person authorised to take a statutory declaration)

I have attached:

- ☐ evidence of the date I left New Zealand (e.g. copy of airline tickets, passport stamp or other documentation showing departure);
- ☐ evidence of my residential address in Australia (e.g. utility bill, bank statement etc.);
- ☐ a letter from my Australian superannuation fund provider, confirming that they are willing to accept a transfer payment from a KiwiSaver scheme into my member account in the fund, and the bank details to be used for the transfer payment (including any reference details needed); and
- ☐ a completed AML Form and certified identity documents (e.g., passport, utility bill).

Note: if you have already previously completed an AML Form and provided the required AML documentation, then please just provide a copy of photo ID (e.g. driver licence, passport).