



Australian Emigration Transfer Form

You can scan the completed application form and other listed requirements and email them to goalsgetter@nikkoam.com or post them to:

GoalsGetter KiwiSaver Scheme
PO Box 3892, Shortland Street,
Auckland 1142

Under the KiwiSaver Act 2006, you may be able to transfer your KiwiSaver account balance to a participating Australian complying superannuation scheme if you have permanently emigrated to Australia. The transfer of your savings from the GoalsGetter KiwiSaver Scheme to a participating Australian complying superannuation scheme is subject to the Manager's approval and the Australian complying superannuation scheme accepting your transfer. Subject to approval, the total value of your KiwiSaver savings must be transferred to your nominated participating Australian complying superannuation scheme up to the maximum amount permitted under Australian legislation (currently \$AUD 450,000). You can apply to transfer your KiwiSaver savings at any time after you have permanently emigrated to Australia. Any government contributions received by you after you left New Zealand will be returned to the government.

Transferring your GoalsGetter KiwiSaver Scheme account balance to a participating Australian complying superannuation scheme may have tax and other financial implications. You should seek independent tax advice and financial advice before transferring your GoalsGetter KiwiSaver Scheme account balance to an Australian complying superannuation scheme.

CHECKLIST

Your application needs to include the following:

- your completed, signed Australian Emigration Transfer Form
- certified copies of proof of your identity and residential address (section 4)
- Evidence of your membership in the participating Australian complying superannuation scheme you wish to transfer your GoalsGetter KiwiSaver Scheme account balance to, including policy number and written confirmation from the Australian superannuation scheme in the form of a letter, that they will accept the transfer of your GoalsGetter KiwiSaver Scheme savings.
- your original statutory declaration signed by you, and taken by a person authorised to take statutory declarations in Australia (section 5)
- evidence you've permanently left New Zealand, for example:
 - confirmed travel and/or shipping arrangements (plane tickets etc)
 - passport evidence (photo, signature and relevant stamped pages proving departure)
- evidence of your current address in Australia for example (utility bill, bank statement, rental agreement etc)

If you provide us with all the requested details with your application, the process including consideration of your application, may take up to 5 business days. If we need to ask you for any additional information, this will cause delays in approval, so it's important you read this application form, including the checklist, and complete it correctly and fully.

1. Your Personal details

| | |
|----------------------|--|
| Title | |
| First name(s) | |
| Surname | |

| | | | |
|---|--|-----------------|--|
| Home address | | | |
| Street | | | |
| Suburb | | | |
| City | | Postcode | |
| Postal address (if different from above) | | | |
| Street | | | |
| Suburb | | | |
| City | | Postcode | |

| | |
|-----------------------------------|--|
| Contact Phone | |
| Email | |
| Date of Birth (dd/mm/yyyy) | |

IRD number:

2. Australian Complying Superannuation Scheme Details

Provider and Scheme Details

| | |
|----------------------------------|--|
| Australian Provider Name | |
| Australian Scheme Name | |
| Australian Business Number (ABN) | |
| Postal Address | |
| Email Address | |
| Phone Number | |

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| | |
| Superannuation product identification number | |

Member account details (as held by the Australian complying superannuation scheme)

| | |
|-----------------------|--|
| Member Account Number | |
| Member Account Name | |

3. Payment Details

All approved transfer amounts will be paid out of the GoalsGetter KiwiSaver Scheme in New Zealand dollars. Fees, service charges and other costs may be incurred in the payment of a transfer amount to an Australian complying superannuation scheme or in the conversion of the amount to Australian dollars. Any fees, service charges and other costs may be paid from the transferred balance.

Approved transfer amounts will be paid to your Australian complying superannuation scheme will be paid by electronic transfer, please provide the account details below **and proof of the account from your scheme provider.**

| | |
|-----------------|--|
| Swift code | |
| BSB | |
| Account Number | |
| Name of Account | |

4. Identification and Proof of Address

As part of your application, you must provide copies of your ID and proof of address.

Please provide us with either:

- a copy of your current passport (page showing your name, date of birth, photograph and signature), or-a copy of your current driver licence showing your name, signature and expiry date, AND a bank account statement or document that contains your full name and addressed to you by a New Zealand registered bank within the last 3 months, or statement from any New Zealand government department addressed to you dated within the last 3 months, or New Zealand SuperGold card, or birth certificate, or
- a copy of your current firearms licence.

AND one of the following issued and dated within the last 3 months, showing your name and current residential address:

- Bank statement
- Utility bill (e.g. power or home phone bill)
- Rates bill
- Letter or statement from a government agency

Who can certify your documents?

If you are overseas, your documents must be certified by a person authorised by law in that country to take statutory declarations or equivalent in the country you are applying from. Your certifier must state what authorises them to be able to certify these documents e.g. NR stamp, CA stamp etc.

The following people can certify photocopies of original documents as true and correct copies:

- Notary Public
- Justice of the Peace
- A person who has legal authority to take statutory declarations (or equivalent) in Australia.

Please note that the certifier must be at least 16 years of age and cannot be:

- a person involved in the transaction requiring the certification
- related to you
- your spouse or partner
- a person who lives at the same address as you.

Copies of ID and proof of address must be recently certified (in the previous three months) as a true copy of the original which represents your identity by one of the people listed above.

5. Agreement and Statutory Declaration

A statutory declaration is a written statement that allows a person to declare something to be true. You'll need to complete this page including signing it, in front of an authorised person. You'll make the declaration, and the person witnessing will take the declaration.

Who can witness the declaration?

The following persons can witness you making the declaration:

- Notary Public
- Justice of the Peace
- Person enrolled as a barrister and solicitor of the High Court
- Registrar or deputy registrar of the Supreme Court, High Court, a District Court or Court of Appeal
- Member of Parliament
- Any other person authorised by law to take statutory declarations
- Or the equivalent person in the country you are making the declaration.

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|---|
| I, Full Name of person making the declaration (you, the member) |
| of, Address |
| Postcode |
| And, Occupation |

solemnly and sincerely declare that, having permanently emigrated from New Zealand on

| | | |
|----|----|----|
| DD | MM | YY |
|----|----|----|

I am now residing in Australia and:

- › I wish to transfer my GoalsGetter KiwiSaver Scheme account balance to an Australian complying superannuation scheme.
- › I have read and understood the **Privacy Statement** set out below.
- › I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed.
- › I acknowledge that on the receipt of my funds by the Australian complying superannuation scheme, Nikko AM, the Manager and/or the Supervisor of the GoalsGetter KiwiSaver Scheme will be released from all liabilities in respect of my membership in the GoalsGetter KiwiSaver Scheme.
- › I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian complying superannuation scheme, and that I am liable for any such tax consequences.
- › I acknowledge that Nikko AM 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 GoalsGetter KiwiSaver Scheme account will be closed upon my KiwiSaver savings being transferred to my nominated Australian Complying Superannuation scheme.
- › I understand that following a transfer of my KiwiSaver savings to an Australian complying superannuation scheme I will not be able to transfer them to a third country.
- › I understand that my application is subject to Nikko AM's approval and that Nikko AM may request additional information in support of this application.
- › I understand that my application will be unable to be processed if my chosen Australian complying superannuation scheme named in section 2 of this application does not accept the transferred funds.
- › I understand the Australian complying Superannuation scheme may require additional information from me before my application is processed.
- › I understand that fees, service charges and other costs may be incurred in the transfer of my GoalsGetter KiwiSaver Scheme account balance to my Australian complying superannuation scheme and that these may be paid from the transferred amount.
- › If I am over 65, I meet the work test as set out in Australian Superannuation legislation.
- › I understand that the "New Zealand sourced" savings in my Australian complying superannuation scheme will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (currently 65).
- › I understand that except as detailed above, once my GoalsGetter 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 complying superannuation scheme.
- › I solemnly and sincerely declare that the information I have provided in this GoalsGetter KiwiSaver Scheme Australian Emigration Application Form is true and correct.

I indemnify the supervisor of the GoalsGetter KiwiSaver Scheme, Nikko AM and any of their related companies against all claims, actions, demands, proceedings, costs or expenses, damages or liability arising and discharge them from any liability in respect of my membership of the GoalsGetter KiwiSaver Scheme and/or any withdrawal payment made. The information I have provided in this form and any attachments is true and correct and complete.

Privacy Statement

I acknowledge that the Privacy Act 1993 gives me the right to access and request correction of personal information held by Nikko AM, Public Trust and their associated entities and agents. The information will be held securely by Nikko AM whose address is Level 17, Vero Centre, Auckland 1010, New Zealand and MMC Limited, whose address is Level 25, QBE Centre, 125 Queen Street, Auckland 1010, New Zealand. I understand that the information supplied will be used to process my withdrawal request from the GoalsGetter KiwiSaver Scheme (and may be disclosed for these purposes to third parties where relevant). The information may also be used by Nikko AM, Public Trust and their

associated entities and agents to offer me other products or services it thinks may be of interest. I acknowledge that the information, and any information provided by me at later dates will be used and may be shared as outlined in our privacy statement on our website at www.nikkoam.co.nz.

I confirm that I am not an undischarged bankrupt or incapable of managing my financial affairs and that I am properly entitled to any payment made pursuant to this withdrawal form and that no other person has any claim against it.

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

Signature of the person making the declaration (you, the member)

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|------------------------|------|
| Declared at (location) | Date |
|------------------------|------|

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|---|------|---|--|
| Signature | Date | | |
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Before me: (the person in front of whom the declaration is made)

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| Full Name of person taking the declaration (the witness) |
| Address |
| Postcode |
| Occupation |

Signature of the person taking the declaration (the witness)

| | | | |
|---|------|---|--|
| Signature | Date | | |
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