

# Retirement Withdrawal Form

KiwiSaver



You can scan the completed application form and other listed requirements and email them to [goalsgetter@nikkoam.com](mailto:goalsgetter@nikkoam.com) or post them to: GoalsGetter KiwiSaver Scheme PO Box 3892, Shortland Street, Auckland 1142

## Checklist

Your application needs to include the following:

- your completed, signed application form if this is your first retirement withdrawal, certified copies of proof of identity and address
- if this is your first retirement withdrawal, your original statutory declaration signed by you, and witnessed by a person authorised to take statutory declarations
- proof of bank account for payment of the withdrawal

Please note that a GoalsGetter KiwiSaver retirement withdrawal can take up to 5 working days to process. We will contact you when we make payment to you.

**If you have previously made an end payment withdrawal, please complete the sections 1, 2 and 6. If you would like this paid to a different account to your last withdrawal, you need to complete section 3 and supply us with proof of your bank account.**

## 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:**

**Prescribed Investor Rate (PIR)**

PIR Rate:  10.5%  17.5%  28%

Your PIR rate may change once you've stopped working (see <http://www.ird.govt.nz/toii/pir/workout/>)

**2. Withdrawal Details**

I have previously made an End Payment Withdrawal from the GoalsGetter KiwiSaver Scheme

**Amount of withdrawal I**

would like to make:

a withdrawal of my full available balance

a partial withdrawal of \$ (the minimum you can withdraw is \$250)

a regular withdrawal of \$ starting at the following frequency:

fortnightly  
monthly  
quarterly

**3. Payment Details**

**Bank Account Details**

We can only pay your withdrawal to your New Zealand bank account and we can't pay to third parties.

If you have previously made an end payment withdrawal, please complete the sections 1, 2 and 6. If you would like this paid to a different account to your last withdrawal, you need to complete section 3 and supply us with proof of your bank account.

**Payment account**

|      |        |                |        |
|------|--------|----------------|--------|
| Bank | Branch | Account Number | Suffix |
|------|--------|----------------|--------|

Name of bank account holder

**Proof of Bank Account**

Please provide proof of the nominated bank account name and number:

- a pre-printed deposit slip
- a copy of a bank statement
- an over-the-counter printed receipt with a tellers stamp
- an online bank account statement with the name of the bank included on the statement

**4. Identification and Proof of Address**

As part of your application, you must provide copies of your ID and proof of address. All photocopied documents must be verified or certified by an authorised person (see below) before sending them to us.

Please provide us with either:

- a certified/verified copy of your current passport (page showing your name, date of birth, photograph and signature), or

- a certified/verified 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 certified/verified 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 NZ government agency

**Who can certify your documents?**

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

- Notary Public
- Justice of the Peace
- Member of the Police
- New Zealand lawyer
- New Zealand Chartered Accountant
- A person who has legal authority to take statutory declarations (or equivalent) in New Zealand.

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. Eligibility for Member Tax Credits**

To be eligible to withdraw member tax credits you have received during your KiwiSaver membership, you must have had your principal place of residence in New Zealand over that time. Please complete the following question to assess your eligibility. If you lived or worked overseas and received member tax credits, we're required to refund that portion of the member tax credits to IRD.

During your KiwiSaver membership, were there any periods when you lived overseas and did not have a permanent residence in New Zealand? Going overseas on holiday, even for several months is not considered a change of principal residence.

- No
- Yes

If yes, list the periods when you lived overseas and did not have a permanent residence in New Zealand:

|            |      |    |
|------------|------|----|
| I lived in | from | To |
| I lived in | from | To |
| I lived in | from | To |

Please note that if you were working overseas as an employee of the New Zealand Government or as a volunteer for certain charitable organisations, you continue to be eligible for member tax credits during those periods of time overseas. If this applies, please provide evidence with your application, such as a letter on your employer's (or former employer's) letterhead confirming the period you were employed overseas.

## 6. Agreement

- I understand that if I withdraw my full balance, my employer contributions will stop (if they haven't already), my GoalsGetter KiwiSaver account will be closed, and I will no longer be a member of the GoalsGetter KiwiSaver Scheme or be able to join a KiwiSaver scheme in the future.

Signature

Date

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## 7. 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 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.

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

solemnly and sincerely declare that:

- I understand that if I have not had a principal place of residence in New Zealand at any time during my KiwiSaver membership, I will not be entitled to withdraw any member tax credits received during that same period. Any member tax credits claimed on my behalf during any such period will be returned to the Commissioner of Inland Revenue.
- The information I have provided in this form and any attachments is true and correct and complete.
- I acknowledge that payment of the withdrawal amount is in partial (in the case of a sum less than the balance of my KiwiSaver savings) or in full (in the case of the total balance) settlement of my rights and interests under the GoalsGetter KiwiSaver Scheme and I indemnify the supervisor of the GoalsGetter KiwiSaver Scheme, Nikko AM and any of their related companies against any liability in relation to such payment.

- 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.
- 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.
- I acknowledge that the Privacy Act 1993 gives me the right to access and request correction of personal information held by GoalsGetter, Public Trust and their associated entities and agents. The information will be held securely by Nikko AM whose address is Level 9, Vero Centre, Auckland 1010, New Zealand and Apex 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](http://www.nikkoam.co.nz).

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 (the member)

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Declared at (location)

Date

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|--|--|
|  |  |
|--|--|

Before me: (the person in front of whom the declaration is made)

Full Name of person taking the declaration (the witness)

Address

Postcode

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Signature of the person taking the declaration (the witness)

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