

Request to transfer superannuation benefits to a New Zealand KiwiSaver Scheme

Information sheet

When to use this form

Use this form to request a transfer of your Resolution Life superannuation account to a New Zealand KiwiSaver Scheme as a result of permanent emigration to New Zealand.

Eligibility

You're eligible to transfer your superannuation if you have left Australia to live permanently in New Zealand, and the KiwiSaver Scheme you're applying to transfer to is approved to accept your transfer.

Important information

- You can only transfer funds from a complying superannuation fund. Other restrictions may also apply.
- You must transfer your full superannuation benefit to your chosen KiwiSaver Scheme.
- If you have any questions when completing this form, call our Customer Service Centre on 133 731 (if calling from Australia) or on +61 2 8048 8162 (if calling from overseas). You can also email us at askus@resolutionlife.com.au.
- The decision to transfer your superannuation to a KiwiSaver Scheme is an important decision and we recommend you obtain financial advice.

Income tax

Benefits from a participating Australian super fund are not taxed when you transfer them to a New Zealand KiwiSaver Scheme. They're also currently tax free when withdrawn from your KiwiSaver Scheme once you're legally allowed to access them.

Payments may be delayed

Where there's a delay or suspension of payment from an investment option by an underlying fund manager due to a lack of liquidity, your transfer request may be delayed until funds become available to Equity Trustees Superannuation Limited in respect of that option.

Steps you need to complete

1. Complete all sections in the attached form.
Note: We can't process your withdrawal if you haven't verified your identity, so please make sure you also complete sections **5** and **6**.
2. Please send this application and your supporting documentation to the address shown at the end of the attached form. All supporting documentation **must** be certified.

Next steps

- If the request is approved, we'll process your transfer request.
- We'll send the payment to your nominated KiwiSaver Scheme provider and let you know that we've processed your request.
- If your request isn't approved, we will advise you.
- It's important that all supporting documentation is certified and provided with this application. Failing to do so will delay the application process or could result in your application being declined. We'll contact you if we require further information.

Who can certify documents?

The following people can certify a document, as well as witness a Statutory Declaration in New Zealand:

- an enrolled barrister and solicitor of the High Court of New Zealand
- a Justice of the Peace (you can find a list of Justices of the Peace in the New Zealand Yellow Pages)
- a notary public
- a Registrar or Deputy Registrar of the District Court, High Court, Court of Appeal or Supreme Court.

! **Important:** Certified copies **must** be stamped or endorsed as being true copies of the originals by a person authorised by law to take statutory declarations in the applicant's country or in New Zealand.

Please keep this information sheet for your records — don't return it with your completed form(s).

Request to transfer superannuation benefits to a New Zealand KiwiSaver Scheme

Use this form to request a transfer of your Resolution Life superannuation to a New Zealand KiwiSaver Scheme as a result of permanent emigration to New Zealand.

You'll be eligible to transfer your superannuation if you've left Australia to live permanently in New Zealand and the KiwiSaver Scheme you're applying to transfer to will accept the amount.

Important: You can only transfer funds from a complying superannuation fund in Australia.

Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

* Denotes mandatory fields — if you don't complete these fields your request may be delayed.

1. Personal details

Title*

Family name*

Given name(s)*

Other/Previous names (attach certified copies of documents)

Gender* Male Female

Date of birth*

Contact phone number Mobile number

Tax File Number (TFN)*

IRD number (8 or 9 digits in following format)*

Current address

Residential address (a PO Box is not acceptable)*

Suburb/Town* Postcode*

Country*

Email address

! Please provide evidence of your current address in section **5 verification of identity and address**.

2. Fund details

FROM (current Resolution Life complying superannuation fund)

Member or Account number*

Product name

! If you have multiple account numbers, you must complete a separate transfer for each account you wish to transfer.

TO (receiving fund)

Your KiwiSaver account details

! **Important:** Please send us written confirmation that your fund can accept this transfer.

KiwiSaver account number* KiwiSaver registration number*

KiwiSaver Scheme provider*

Postal address*

Contact phone number

Email address*

2. Fund details (continued)

TO (receiving fund) (continued)

Your KiwiSaver account details (continued)

How would you like your transfer to be made?

- EFT to the KiwiSaver bank account**—we'll process the transfer and send the correspondence to the address or email listed above.

Financial institution name*

Financial institution address*

Account holder names(s)*

Account number*

SWIFT code*

BSB/Routing number*

3. Evidence of permanent emigration

a. Date of departure from Australia

b. Evidence of your departure from Australia

Please provide certified evidence of your departure from Australia by selecting one of the check boxes below:

- copy of your passport page showing arrival stamp, or
- international movements record or evidence of any necessary visas, or
- evidence of your New Zealand tax status issued by the relevant New Zealand tax authority.

Note: All documentation **must** be certified.

If you're unsure about whether your evidence will be satisfactory, email us at askus@resolutionlife.com.au and we'll confirm it for you.

4. Statutory declaration

Person making the declaration

By signing this **Request to transfer superannuation benefits to a New Zealand KiwiSaver Scheme** form I am making the following statements:

- I declare that all the information provided in or with this application is true and correct.
- I have permanently emigrated from Australia to New Zealand and request that my Resolution Life superannuation account be transferred to the account shown under the '**TO (receiving fund)**' heading shown in section 2 (**Fund details**).
- I have been a member of an Resolution Life superannuation account and my principal place of residence was Australia for the period(s):

From To

From To

From To

- I understand that any information I give to Resolution Life may be passed on to my chosen KiwiSaver Scheme provider as reasonably required and I authorise Resolution Life to give such information in relation to this transfer as requested by my chosen KiwiSaver Scheme provider.
- I understand that the information supplied by me with this application will be used to process this application and to administer my account (and may be disclosed for these purposes to third parties where relevant, including the Australian Taxation Office, my financial adviser or my KiwiSaver Scheme provider).
- I authorise Resolution Life to obtain additional information in relation to this application from any third party/entity.
- I acknowledge that there may be tax consequences when transferring my superannuation to a KiwiSaver Scheme, and that I am liable for any such tax consequences.
- I understand that my Resolution Life superannuation account will be closed upon my superannuation being transferred to my chosen KiwiSaver Scheme provider.
- I understand that following a transfer of my Resolution Life superannuation funds to a KiwiSaver Scheme, I will not be able to transfer them to a third country.
- I understand my chosen KiwiSaver Scheme provider may request additional information to support this application.
- I discharge Resolution Life Limited from all further liability in respect of the benefits paid.
- I understand that the 'Australian-sourced' superannuation in my KiwiSaver account will not generally be able to be accessed until I reach age 60 and permanently retire and I cannot access these funds as part of the first home buyer scheme.

4. Statutory declaration (continued)

Person making the declaration (continued)

- I understand that once my Resolution Life superannuation has been transferred to New Zealand, it will become (with a few exceptions) subject to the rules and regulations governing the New Zealand KiwiSaver Scheme.
- I understand that Resolution Life has recommended I obtain financial advice before requesting this transfer.
- I make this declaration conscientiously believing the same to be true and by virtue of the *Oaths and Declarations Act 1957*.

Declared at

on this date

PLACE

D D M M Y Y Y Y

Signature of person making the declaration

X

Before me:

Note: Please provide signature, name, occupation and address of the person in front of whom the declaration is made (refer to the attached **information sheet** for a list of people who can certify this statutory declaration in New Zealand).

Person witnessing the declaration

Title

Surname

Given name(s)

Qualification of person witnessing the declaration

Address of person witnessing the declaration

Suburb

State

Postcode

Signature of person witnessing the declaration

X

Date

D D M M Y Y Y Y

OFFICIAL MARK

! Please ensure that the person taking this declaration also completes and signs section **6 certification of identity and address documents**.

5. Verification of identity and address

Please choose the required document(s) from this section to provide identification to verify your identity and address.

Important:

- You must attach certified copies of the selected document(s) to this request.
- Please give the original, along with a photocopy of your identity and address documents (selected from the options below) to the person taking your statutory declaration in section 4.
- Attach only the certified photocopies of the original documents to this request. Do not send originals.
- Refer to **who can certify documents?** in the attached **information sheet** for a list of people who can certify documents.

Proof of identification

Please provide **one** of the following valid identification documents:

- Current passport
- Current driver's licence
- New Zealand certificate of identity

Proof of address

As well as providing your identity documents, you must also supply proof of your address.

Please provide **one** document from the list below:

- Letter or invoice from a New Zealand utility company
- A New Zealand bank statement
- Letter from a New Zealand government agency (eg IRD, rates notice)

Note: The document you supply needs to be addressed to you at a residential address in New Zealand and dated within the last 12 months.

6. Certification of identity and address documents

The person taking your statutory declaration in section 4 must complete the following declaration concerning your documents identified with a cross in section 3 and 5.

I confirm that:

- I have sighted today the original of each document identified with a cross in section 3 and 5 verifying the identity, address and evidence of departure from Australia of the person named in section 1 of this form, and attached to this statement are true copies of those documents initialled by me.
- The documents that have been provided represent the identity of the person named in section 1 of this form.
- I am not related to and do not live at the same address as the person named in section 1 of this form, and I am over 16 years of age.

Signature of authorised person

X

Dated

D D M M Y Y Y Y

7. Checklist

- Have you completed and signed all relevant sections of this form?

In particular:

- Have you completed the statutory declaration in section 4?
- Have you attached copies of the supporting evidence as detailed in section 3 and 5?
- Have you verified your identity and attached copies of the supporting evidence as detailed in section 5?
- Have your supporting documents been verified by the person authorised to take the statutory declaration in section 6?

Where to send this form

Email or mail this completed form (and any supporting documents) to:

Resolution Life Customer Service
GPO Box 5441
Sydney NSW 2001

Any questions?
133 731

askus@resolutionlife.com.au