

KiwiSaver transfer request

Important information

Please note: This form is only for use by members who have emigrated to live permanently in New Zealand and wish to transfer their superannuation balance to a KiwiSaver account that they have established in New Zealand.

1. Personal details

(All fields must be completed)

Account or client number¹ Alternate member number

Title Date of birth

Given name(s)

Surname

New Zealand residential address

Suburb

City Postcode

Country

New Zealand postal address

Suburb

City Postcode

Country

Mobile number Alternate phone number

Email

2. Transfer instructions

I have confirmed that my KiwiSaver scheme will accept transfers from Australian superannuation funds and request that my superannuation benefit be transferred in full to my KiwiSaver account.

Name of KiwiSaver scheme

Postal address of KiwiSaver scheme

Suburb

City Postcode

Country

KiwiSaver registration number	<input type="text"/>
Member Inland Revenue Department number (IRD)	<input type="text"/>
Member KiwiSaver account number	<input type="text"/>

3. Payment instructions for overseas residents

(All fields must be completed)

Name of financial Institution

Address of financial Institution

Suburb

City Postcode

Country

¹ Depending on the type of product the member had, this may be referred to as a policy number, member number, contract or client number.

5. Identification requirements (continued)

A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described) or a person who is in the following list:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- An officer with, or a credit representative of, a holder of an Australian Credit Licence (ACL), having two or more years of continuous service with one or more licensees
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years of continuous service with one or more licensees
- Australian Consular Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Consul-General
 - b. Consul
 - c. Vice-Consul
 - d. Trade Representative
 - e. Consular Agent
- Australian Diplomatic Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Ambassador
 - b. High Commissioner
 - c. Minister
 - d. Head of a Mission
 - e. Commissioner
 - f. Charge d'Affaires
 - g. Counsellor, Secretary or Attache at an Embassy, High Commissioner's office, Legation or similar
- Bailiff
- Bank officer with two or more continuous years of service
- Building society officer with two or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with two or more years of continuous service
- Employee of the Australian Trade and Investments Commission who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place
- Employee of the Commonwealth who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (c) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with two or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Australian Defence Force who is:
 - a. an officer or
 - b. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or
 - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - a. the Parliament of the Commonwealth or
 - b. the Parliament of a State or
 - c. a Territory legislature or
 - d. a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of:
 - a. the Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority or
 - c. a local government authority or
 - d. with two or more years of continuous service and the person is not already specified in another item on this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - a. the Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution.

5. Identification requirements (continued)

Persons who can certify documents in New Zealand

A declaration made in New Zealand must be in the form in Schedule 1 of the Oaths and Declarations Act NZ (1957), and must be made before:

- a. a person enrolled as a barrister and solicitor of the High Court; or
- b. a Justice of the Peace; or
- c. notary public; or
- d. the Registrar or a Deputy Registrar of the Supreme Court; or
- e. the Registrar or a Deputy Registrar of the Court of Appeal; or
- f. a Registrar or Deputy Registrar of the High Court or a District Court; or
- g. some other person authorised by law to administer an oath; or
- h. a member of Parliament; or
- i. a person who:
 - i. is a fellow of the body (incorporated under the Incorporated Societies Act 1908) that, immediately before the commencement of the Oaths and Declarations Amendment Act 2001, was called the New Zealand Institute of Legal Executives; and
 - ii. is acting in the employment of the holder of a practising certificate as a barrister and solicitor of the High Court; or
- j. an employee of the New Zealand Transport Agency, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette; or
- k. an employee of Public Trust constituted under the Public Trust Act 2001, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette; or
- l. an officer in the service of the Crown, or of a local authority within the meaning of the Local Government Act 2002, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette.

What you need to know

Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL No. 229757, RSE Licence No. L00001458 (Trustee) as trustee of the Super Retirement Fund ABN 40 328 908 469 (Fund) is the product issuer.

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) and AIA Australia Limited ABN 79 004 837 861, AFSL No. 230043 (AIAA) are the issuers of life insurance policies to the Trustee for this product.

The Trustee, as owner of the life insurance policies, will receive the applicable benefit from Resolution Life and AIAA, and in turn provides the benefit to eligible Fund members. The information contained in this document is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you.

Resolution Life is part of the Resolution Life Group and can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.

6. Declaration and acknowledgment

By signing this request form I declare as follows:

- I have fully read the form and the information completed is true and correct.
- If I am signing under a Power of Attorney, I have not received revocation of the Power.

Print name

Policy owner 1

Date

Where to send this form

This form must be mailed to:

Resolution Life
Locked Bag 5075
Parramatta NSW 2124