NZFUNDS KIWISAVER SCHEME

KiwiSaver
Poua he Oranga

Authority to Provide Information (Australian Superannuation)

Please complete this form if you have permanently emigrated to New Zealand and wish to transfer your Australian Superannuation to the NZ Funds KiwiSaver Scheme.

For more information on the transfer process, please contact NZ Funds or your Financial Adviser.

Complete and return to: FreePost NZ Funds KiwiSaver Scheme, Private Bag 92163, Auckland 1142 or email *kiwisaver@nzfunds.co.nz*

1 | Receiving KiwiSaver Scheme details

Name of Scheme
NZ Funds KiwiSaver Scheme

Postal address
Private Bag 92163, Auckland 1142

Registration number
10072

2 | Member details

Name

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

Last known Australian address

Street/PO box

Suburb | Town / city | Postcode

New Zealand address

Street/PO box

Suburb | Town / city | Postcode

Phone number(s)

Mobile | Home ( ) | Business ( )

Date of birth

Day | Month | Year

Email

Member number
N Z F

IRD number

Continued over...

3 | Australian superannuation fund details

If you have more than one Australian superannuation fund please complete and sign a separate form for each fund.

Australian superannuation provider

Australian superannuation fund name

Account/membership number

Australian tax file number

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

4 | Authority and acknowledgement

- I have permanently emigrated to New Zealand.
- I authorise NZ Funds (as manager of the NZ Funds KiwiSaver Scheme) to act on my behalf for the purpose of actioning my permanent emigration transfer to the NZ Funds KiwiSaver Scheme and to obtain all information and documentation from the provider of my Australian superannuation fund listed in Section 3 which is necessary to complete the transfer.
- I authorise the provider of my Australian superannuation fund listed in Section 3 to release all information regarding me and my superannuation to NZ Funds and to take instructions from NZ Funds in relation to the transfer.
- I authorise NZ Funds to give to the provider of my Australian superannuation fund listed in Section 3 any information that I give in this form and any other information that my Australian provider requests in relation to the transfer.
- I understand that the transfer is subject to the approval of NZ Funds and the provider of my Australian superannuation fund listed in Section 3 and that I will be required to complete further documentation in relation to this permanent emigration transfer request.
- I understand that following a permanent emigration transfer of my Australian superannuation funds to the NZ Funds KiwiSaver Scheme I will not be able to transfer them to a third country (being a country other than New Zealand or Australia).
- I understand that any 'Australian-sourced' balance in my NZ Funds KiwiSaver Scheme account will not be able to be accessed until I reach age 60 and satisfy the definition of retirement as set out in the applicable Australian regulations.
- I understand that if I become eligible to withdraw some of my funds to purchase a home, I will not be able to withdraw the amount transferred from my Australian superannuation fund.
- I understand the permanent emigration transfer of my Australian superannuation fund to the NZ Funds KiwiSaver Scheme will not be considered eligible contributions for the purpose of receiving any member tax credits or first home deposit subsidy.
- I understand that NZ Funds cannot provide any assurance as to when my Australian funds will be transferred to the NZ Funds KiwiSaver Scheme or converted into New Zealand dollars. I understand that NZ Funds will not be liable for any decrease in the value of my retirement savings or change in conversion rate that may occur during the transfer process.
- I understand that once my Australian superannuation funds have been transferred to the NZ Funds KiwiSaver Scheme, they will become, with a few exceptions, subject to the rules and regulations governing the NZ Funds KiwiSaver Scheme.
- I acknowledge that NZ Funds recommends that I seek independent and professional Australian and New Zealand tax advice and financial advice pertaining to my circumstances in relation to the proposed transfer.

Signature

Signature of member

Day Month Year

Adviser name

Advisory firm

Important information for members

- Please retain a copy of all superannuation records, including this form.
- In the event that you decide to return to Australia in the future, and take your superannuation savings with you, you will need to provide copies of your superannuation records to your chosen Australian Prudential Regulation Authority (APRA) fund. The APRA fund will need this to establish which amounts have previously been counted towards the non-concessional contributions cap.
- For further information on the contributions caps and Excess Contributions Tax, please visit the Australian Tax Office website: *www.ato.gov.au/supercaps*