

Australian Superannuation transfer process

Information Sheet
July 2020

Australian Superannuation transfer process steps

Step 1

Complete the Authority to Provide Information (Australian Superannuation) Form and send it to NZ Funds, Private Bag 92163, Auckland 1142.

The Authority to Provide Information (Australian Superannuation) Form (one per Provider) may be obtained from NZ Funds (P. 0508 733 337) or from your Authorised Financial Adviser.

If you are not already a member of the NZ Funds KiwiSaver Scheme, please complete the process to become a member of the NZ Funds KiwiSaver Scheme first. A copy of the NZ Funds KiwiSaver Scheme Product Disclosure Statement is available on request or by visiting the NZ Funds website at www.nzfunds.co.nz.

Step 2

Once received, NZ Funds will send the Authority to Provide Information (Australian Superannuation) Form(s) to all Australian Superannuation Providers detailed on the form, with an accompanying letter requesting their documentation requirements in order to action your transfer.

Step 3

On receipt of the Authority to Provide Information (Australian Superannuation) Form, your Australian Provider/s will inform us of the documentation required to complete the transfer.

This may include (but is not limited to) a certified copy of your Driver's Licence, Birth Certificate and/or Passport. They may also require a Statutory Declaration regarding your permanent emigration or return to New Zealand.

Please note that requirements may vary between Australian Providers.

Step 4

When the documentation requirements are received, NZ Funds will contact you or your Authorised Financial Adviser to discuss the requirements.

When completed, NZ Funds will forward the relevant documentation to your Australian Provider.

Step 5

If the documentation is accepted, your Australian Provider/s will proceed with the transfer. They will either forward a cheque payable to the NZ Funds KiwiSaver Scheme or transfer funds electronically to the NZ Funds KiwiSaver Scheme.

Upon receipt of funds, the NZ Funds KiwiSaver Scheme will allocate the funds to your NZ Funds KiwiSaver account according to your chosen portfolio allocation.

Step 6

The NZ Funds KiwiSaver Scheme will confirm the funds have been received and allocated to your KiwiSaver account and generate a 'Transfer Confirmation' letter which will be sent to you, notifying you the transfer has been received, and the corresponding \$NZ value applied to your account.

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