

3. Australian complying superannuation scheme transfer authorisation and acknowledgement

Please arrange for the transfer of funds from my Australian complying superannuation scheme to the Kiwi Wealth KiwiSaver Scheme. I understand that this application is subject to the approval of Kiwi Wealth Limited and the provider of my Australian complying superannuation scheme.

I authorise Kiwi Wealth Limited and anyone representing Kiwi Wealth Limited to act on my behalf for the purpose of actioning the transfer. This includes obtaining documents and other information from my Australian complying superannuation scheme which are required to complete the transfer.

I will provide Kiwi Wealth Limited with any information it may require to complete the transfer. I understand that any information I give to Kiwi Wealth Limited may be passed on to my chosen Australian complying superannuation scheme as reasonably required and I authorise Kiwi Wealth Limited to give such information in relation to this transfer as requested by my chosen Australian complying superannuation scheme. This information may also be provided to the Trustee and related entities of Kiwi Wealth Limited (and those who provide services to those entities).

I acknowledge that there may be tax consequences when transferring my Australian savings to the Kiwi Wealth KiwiSaver Scheme, and that I am liable for any such tax consequences.

I acknowledge that Kiwi Wealth Limited has recommended that I seek independent and professional Australian and New Zealand tax and financial advice regarding my circumstances in relation to the proposed transfer.

I have permanently emigrated from Australia to New Zealand and do not intend to return to Australia to live.

I do not intend to transfer to another KiwiSaver scheme before the transfer of my savings from an Australian complying superannuation scheme takes place.

I understand that once my Australian complying superannuation scheme funds have been transferred to the Kiwi Wealth KiwiSaver Scheme they will become (with a few exceptions) subject to the rules and regulation governing the Kiwi Wealth KiwiSaver Scheme.

I understand that the savings in my Kiwi Wealth KiwiSaver Scheme account that are transferred from Australia may be accessed at age 60 if I fulfil the Australian definition of "retired".

I understand that following a transfer of my Australian complying superannuation scheme funds to the Kiwi Wealth KiwiSaver Scheme I will not be able to withdraw these savings for the purposes of a first home withdrawal. I also understand that any funds transferred will not count towards my eligibility for the first home deposit subsidy or any member tax credits.

I understand that following a transfer of my Australian complying superannuation scheme funds to the Kiwi Wealth 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 the transfer of my Australian complying superannuation scheme funds to the Kiwi Wealth KiwiSaver Scheme will be subject to currency fluctuations, and the savings will be converted at the conversion rate available at the time payment confirmation is received from Australia. Foreign exchange, telegraphic transfer and/or bank fees may also apply, and I acknowledge I am fully liable for such fees. I acknowledge that Kiwi Wealth Limited and the Trustee have no liability for any losses suffered as a result of currency conversion and that I am responsible for any exchange risks from the conversion of currencies.

Signature

x

Date

DD / MM / YYYY

4. Checklist

- I have attached a copy of my membership certificate or recent statement from the Australian complying superannuation scheme I wish to transfer from.
- I have confirmed with my Australian complying superannuation scheme that they are participating in the Trans-Tasman Portability Agreement.

Once you have completed this form please post to:

Kiwi Wealth Limited
PO Box 10068
Wellington 6143
New Zealand

Please do not fax/email this form.