

## Permanent Emigration - Transfer to an Australian Complying Superannuation Scheme Application Form

Please use this form if you have permanently emigrated to Australia and you want to apply to transfer your Kiwi Wealth KiwiSaver Scheme (KWKS) member account balance to an Australian complying superannuation scheme.

If you require assistance completing this form or have questions, please contact us on 0800 427 384 or +64 4 494 6079.

### 1. Member details

Full name	<input type="text"/>										
Date of birth	<input type="text" value="DD / MM / YYYY"/>				IRD number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>										
Suburb	<input type="text"/>										
Town/city	<input type="text"/>						Postcode	<input type="text"/>			
Daytime phone	<input type="text"/>					Email address	<input type="text"/>				
Member number	<input type="text" value="K"/>	<input type="text" value="W"/>	<input type="text" value="K"/>	<input type="text" value="S"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date permanently left New Zealand for Australia	<input type="text" value="DD / MM / YYYY"/>										

To ensure that the correct member tax credit payments have been made to your account, please provide details of any periods you have lived outside of New Zealand since you joined KiwiSaver (travel/holiday periods not required):

I permanently lived in New Zealand for the full duration of my KiwiSaver membership until the date I permanently left New Zealand above.

I lived outside of New Zealand for the following periods during my KiwiSaver membership:

Departed from New Zealand	Returned to New Zealand
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

### 2. Details of the Australian complying superannuation scheme you wish to transfer from

Name of scheme	<input type="text"/>
Scheme ABN	<input type="text"/>
Scheme address	<input type="text"/>

Your member number

Your Australian Tax File number

  

We will require a copy of a pre-printed deposit slip, or a letter, from your Australian complying superannuation scheme to confirm the bank account details of the scheme you are transferring to and a current statement.

### 3. Consent and signature

The information in this form and any required supporting documentation is being collected so a decision can be made regarding your Trans-Tasman transfer request. Kiwi Wealth KiwiSaver Limited (the "Manager") and its related entities and Public Trust (the "Trustee") (and those who provide services to those entities) will have access to this information. Access is subject to strict security arrangements, and the Trustee and the Manager and its related entities will comply with the Privacy Act 1993 when dealing with this information.

I understand that any information I give to the Manager may be passed on to my chosen Australian complying superannuation scheme provider as reasonably required and I authorise the Manager to give such information in relation to this transfer as requested by my chosen Australian complying superannuation scheme.

- I understand that my application is subject to approval and that the Manager may request additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation scheme will not provide confirmation that they will accept the transferred funds.
- I acknowledge that there may be tax consequences when transferring my KWKS funds to an Australian complying superannuation scheme, and that I am liable for any such tax consequences.
- I acknowledge that any member tax credits I received whilst residing out of New Zealand and remaining a member of KWKS will be deducted from my member account and returned to the Commissioner of Inland Revenue.
- I acknowledge that the Manager 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 understand that my KWKS member account will be closed upon my KWKS funds being transferred to my chosen Australian complying superannuation scheme.
- I acknowledge that on receipt of my funds by the Australian complying superannuation scheme, the Trustee and the Manager will be released from all liabilities in respect of my membership in KWKS.
- I understand that the transfer value will be based on the valuation of my interest in KWKS as at the date my application is processed, and the exchange rate prevailing when my KWKS funds are converted into Australian dollars. Foreign exchange and/or telegraphic transfer fees may apply. I acknowledge I am fully liable for such fees. I acknowledge that the Manager 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.
- I understand that I am responsible for all fees (including bank fees) incurred in respect of transferring my KWKS funds to an Australian complying superannuation scheme.
- I understand that once my KWKS funds have been transferred to Australia, they will become (with a few exceptions) subject to the rules and regulations governing the Australian superannuation scheme.
- I understand that following a transfer of my KWKS funds to an Australian complying superannuation 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 funds transferred from my KWKS member account to an Australian complying superannuation scheme will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached.

Signature of member

#### 4. Statutory declaration

I \_\_\_\_\_

(Full name)

Of \_\_\_\_\_

(Address)

\_\_\_\_\_  
(Occupation)

Do solemnly and sincerely declare that:

1. I have permanently emigrated from New Zealand to Australia and have no intention of returning to live in New Zealand permanently.
2. I have accurately reflected the date which I permanently left New Zealand above in section 1.
3. I permanently resided in New Zealand for the full duration of my KiwiSaver membership until the date I permanently left New Zealand for Australia above in section 1, other than the additional periods detailed in section 1 above.
4. The information provided in this form and all supporting documentation is true and correct.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Signature of the person making the declaration

X

Declared at \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 20 \_\_\_\_\_

Before me:

(Signature, name, occupation and address of the person in front of whom the declaration is made.)

NAME
ADDRESS
TELEPHONE

OCCUPATION
Occupation means the authority to take statutory declarations e.g. Justice of the Peace, Solicitor.
SIGNATURE

#### Statutory declaration made outside New Zealand

A declaration made in a Commonwealth country other than New Zealand shall be made before one of the following:

- a Judge
- a Commissioner of Oaths
- a Notary Public
- a Justice of the Peace
- a Commonwealth Representative
- any person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding.

**The name, occupation and telephone number of the person taking the declaration must be clearly noted.**

## Supporting evidence checklist

The following documentation is required before your application can be assessed:

(Please check you have enclosed evidence of the following (if applicable), then tick the relevant boxes to confirm)

Evidence of your permanent residence at an Australian address (showing the Australian address where you have resided since your departure from New Zealand), for example:

- a copy of a property sale and purchase agreement; or
- tenancy/leasing agreement for an Australian property; and
- recent utility bill (within the last three months); or
- recent bank statement (within the last three months)

Evidence of your departure from New Zealand, for example:

- a copy of confirmed travel arrangements; or
- passport evidence; or
- any necessary visas or shipping contracts/documentation; or
- Australian employment, i.e. a copy of a contract or letter from your Australian employer; or
- Australian tax status issued by the relevant Australian tax authority

Photocopies of identification that has been certified by a person authorised to take statutory declarations. The required identification is a certified photocopy of the following:

- Your current passport; or
- Your current Firearms Licence; or
- Your birth certificate **AND** one of the following;
  - your 18+ card; or
  - your current New Zealand Driver Licence; or
- Your current New Zealand Driver Licence **AND** one of the following:
  - both sides of a bank credit, debit or Eftpos card; or
  - a recent bank statement (i.e. dated within the last twelve months); or
  - a recent statement from a government agency (i.e. dated within the last twelve months)

A pre-printed deposit slip, or a letter, from your Australian complying superannuation scheme to confirm the bank account details of the scheme you are transferring to and a current statement

The application form has been completed and the statutory declaration has been signed in front of an authorised person

Please return your completed application form and required documentation to:

**Kiwi Wealth KiwiSaver Limited**

**PO Box 10068**

**Wellington 6143**

**New Zealand**