

Information for Transfers to KiwiSaver schemes

What is a KiwiSaver?

A KiwiSaver is a voluntary retirement savings scheme available to permanent residents of New Zealand. From 1 July 2013, you may be able to transfer your Australian superannuation to a New Zealand KiwiSaver scheme under the Trans-Tasman Retirement Savings Portability provisions of both countries.

We recommend that you seek financial and tax advice to consider your personal circumstances prior to transferring your account balance.

Eligibility

You're eligible to transfer to a KiwiSaver scheme if you:

- have permanently emigrated to New Zealand
- are a New Zealand citizen and are returning to New Zealand to live there permanently
- are transferring your full account balance, and
- have an account in a KiwiSaver scheme that accepts transfers from Australian superannuation funds.

Note: Defined benefits, pensions, non-commutable (market linked) pension and Self Managed Super Funds cannot be transferred.

How we process your request

- If your completed request is received before 3.00 pm AEST/AEDT, it will usually be processed using the unit price for that business day (which is calculated at the end of the day)
- If your completed request is received after 3.00 pm AEST/AEDT, it will usually be treated as having been received the next business day
- Where you currently hold money in an illiquid investment option, or an investment option you have has become illiquid, we may take longer than 30 days to transfer out of the investment option.

There are times when we might not be able to process your withdrawal instructions, for example when:

- there are liquidity issues in the investment
- the fund manager suspends transactions
- we can't obtain a price
- the instruction is incomplete, or
- unforeseen circumstances prevent us from using our administration systems.

In these circumstances we will advise you as soon as possible of any changes.

How will you receive the payment?

Payments will be made in Australian dollars and paid to your KiwiSaver scheme only.

More information

If you have any questions please speak with your financial adviser or call us on **132 652** or **+61 3 8634 4721** from outside of Australia.

Transfers to KiwiSaver schemes

We can only accept your request if the form is correctly completed.

Please don't photocopy this form as it contains unique information to help us process your request quickly.

1. Your account details

Account/Policy number

Contact telephone number (business hours)

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

Email

Gender

Male ☐ Female ☐

New Zealand residential address

Your residential address (can't be a PO Box)

Street address

Suburb/Town/Locality

Postcode

New Zealand

2. Last address in Australia

Residential address

Unit number

Street number

Street name

Suburb

State

Postcode

Australia

3. Your Tax File Number (TFN)

Have you previously provided us with your TFN?

Yes ☐ Please go to **Section 4**.

No ☐ Please write your tax file number in the box below.

Tax File Number (TFN)

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You don't have to provide your TFN.

Your TFN is confidential, and MLC is authorised to collect and disclose your TFN under the Superannuation Industry (Supervision) Act 1993 and Privacy Act. MLC may use your TFN only for lawful reasons, in paying out money, identifying or combining superannuation benefits. Your TFN may be disclosed to the trustee of another Fund or RSA provider if your benefits are transferred, unless your request in writing for it not to be disclosed.

4. Emigration status

Have you permanently emigrated to New Zealand?

Yes ☐

No ☐

You must provide us with:

- a statutory declaration confirming you've permanently emigrated to New Zealand, and,
- certified copy of proof of residence in New Zealand for example; certified copy of a utilities bill, council rates notice, bank statement or insurance policy document confirming your residential address as indicated in this form.

5. Receiving KiwiSaver scheme details

KiwiSaver scheme name

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New Zealand postal address

Street address

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Suburb/town/locality

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Postcode

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New Zealand

KiwiSaver registration number

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Member KiwiSaver account number

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Member IRD number

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6. Proof of Identity documents

Before we can process your request, please provide certified copies of ID from either the Primary ID or Secondary ID options:

Primary ID

| Tick (✓) | |
|--------------------------|--|
| <input type="checkbox"/> | A current passport or similar travel document containing a photograph and signature. |

OR

Secondary ID – Provide TWO ID documents

| Tick (✓) | Provide ONE document from this section |
|--------------------------|--|
| <input type="checkbox"/> | • A foreign drivers licence containing a photograph and full name, or |
| <input type="checkbox"/> | • A foreign national ID card issued by a foreign government containing a photograph and full name. |

AND

| Tick (✓) | Provide ONE document from this section |
|--------------------------|--|
| <input type="checkbox"/> | • A birth certificate, or |
| <input type="checkbox"/> | • A citizenship certificate. |

Documents that are written in a language other than English, must be accompanied by an English translation prepared by an accredited translator.

Persons authorised to certify ID documents

The following persons in Australia are authorised to certify a document as a true copy of the original document:

- A Justice of the Peace (or equivalent)
- A judge of a court
- A magistrate
- A registrar or deputy registrar of a court
- A notary public (for the purposes of the Statutory Declaration Regulations 1993)
- A police officer, or
- An Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955).

You can have copies of your documents certified by consular staff at an Australian:

- Embassy
- High Commission, or
- Consulate.

In New Zealand, your documents can be certified by a:

- notary public
- Justice of the Peace
- judge of the court, or
- registrar or deputy registrar of a court.

Acceptable certification of ID documents

You'll need to get your proof of identity documents certified by a person authorised to certify identification documents, under the Statutory Declaration Regulations (1993).

A person approved to certify identification documents must provide the following information:

- **If single page:** This is to certify this is a true copy of the original which I have sighted.
- **If multiple pages:** I certify that this and the following (number of pages) are a true copy of the original which I have sighted.
- Each following page must be initialled and dated. Write their
 - full name
 - contact address and telephone number
 - date of certification
 - signature
- The capacity in which they have certified the document (eg Justice of the Peace, registered pharmacist, judge, magistrate, police officer etc)
- Add the official stamp or seal of the certifier's organisation.

A full list of people authorised to certify documents is available in the **Proof of identity guide** on mlc.com.au

7. Declaration

I declare that:

- I am a resident of New Zealand and have migrated permanently to New Zealand
- I approve the deduction of a termination fee/exit fee (if any) from the benefit paid
- I have read and understood the information on page 1
- All details in this form are true and correct, and
- I authorise the full withdrawal and closure of my account as specified in this form.

Signature of Investor or Attorney

Name

| | | | | | | |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|  | Date (DD/MM/YY) | | | | | |
| | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

If signed under Power of Attorney: Attorneys must attach a certified copy of the Power of Attorney and identification for themselves (go to mlc.com.au to download the relevant identification form) if not already supplied. The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be faxed.

8. Send us your form

Please mail your completed, signed and dated form to:

MLC
PO Box 200
North Sydney NSW 2059

If you have any questions, please speak with your financial adviser, call us on **132 652** within Australia or on **+61 3 8634 4721** if calling from outside Australia, Monday to Friday between 8 am and 6 pm (AEST/AEDT) or visit mlc.com.au