

ANZ DEFAULT KIWISAVER SCHEME

TRANS-TASMAN TRANSFER APPLICATION FORM

Australia to New Zealand



Post/email this form and supporting evidence to the trustee of your Australian complying superannuation fund. You may need to visit your Australian provider's website to find their contact details.

1. YOUR INFORMATION

Australian fund name									
Australian fund membership number									
ANZ Default KiwiSaver Scheme investor number									
IRD number									
<input type="checkbox"/> Mr <input type="checkbox"/> Miss <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Other									
First name(s)									
Surname									
New Zealand residential address									
	Postcode								
Contact number									
Email									
Last known address in Australia									
	Postcode								
Date of birth	<table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female								
Date of permanent emigration to New Zealand	<table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		

2. KIWISAVER SCHEME DETAILS

KiwiSaver scheme name	ANZ Default KiwiSaver Scheme
KiwiSaver scheme registration number	KSS10001
KiwiSaver provider name	ANZ New Zealand Investments Limited
KiwiSaver provider postal address	PO Box 7149, Victoria Street West, Auckland 1142
KiwiSaver provider email address	service@anzinvestments.co.nz
Phone number	+64 9 356 4000

Please pay funds into the following Australian dollar bank account:

Bank SWIFT	ANZBNZ22
Bank name and address	ANZ Bank New Zealand Limited, Wellington
Beneficiary name	The NZ Guardian Trust Co Ltd as Trustee of ANZ Default KiwiSaver A/C
Beneficiary address	Level 17, ANZ Centre, 23-29 Albert Street, Auckland 1010
Beneficiary account number	218409AUD00001
Remittance instructions	Member's name and KiwiSaver scheme investor number

ANZ New Zealand Investments Limited does not accept cheques.

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3. CONFIRMATION OF ACCEPTANCE

ANZ New Zealand Investments Limited ('ANZ Investments'), will accept the withdrawal amount from your Australian complying superannuation fund.

4. CHECKLIST

Make sure you send your Australian complying superannuation fund everything listed below as they can't consider your request without the following. They may also require further information from you.

- ☐ Your completed application.
- ☐ Your completed statutory declaration, signed by you and witnessed by a person authorised to take statutory declarations within the last three months. (see section 6).
- ☐ Evidence that you live permanently in New Zealand, for example, a utility bill in your name issued in the last three months.
- ☐ Certified copy of your passport or driver licence. The person who takes your statutory declaration can also certify your identification (a fee may be payable).

Things you need to consider when transferring your superannuation: When you transfer your super, your entitlement under that fund will cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your Australian complying super fund must give it to you. Some of the points you may consider are:

- **Fees** – your transferring fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this application form. The fees could include administration fees as well as exit or withdrawal fees. Your receiving fund may also charge entry or deposit fees on transfer. Differences in the fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your transferring fund may insure you against death, illness or an accident that leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. KiwiSaver schemes do not generally provide insurance of their members, and you will therefore need to seek any insurance you need separately.
- **Tax** – the tax treatment of Australian superannuation schemes and KiwiSaver schemes are different. The ways in which your savings are taxed, and the applicable rates, are different.

5. HOW LONG IT WILL TAKE

Once we receive the payment from your Australian provider, it can take up to 15 business days to clear and show in your account. It may take longer if there are public holidays, or we need to ask you for additional information.

 Call 0800 736 034 (+64 9 356 4000 if overseas) or email service@anzinvestments.co.nz if you have any questions.

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6. STATUTORY DECLARATION

Important – read this section before completing your statutory declaration.

- ANZ branch staff can't take statutory declarations. A solicitor, Justice of the Peace or Notary Public can take this statutory declaration for you. For more information about who can take statutory declarations, see anz.co.nz/myid.
- All of the boxes must be completed.
- Include your occupation. If you, the member, are either retired or unemployed, this too must be noted in the occupation box.

Any errors will require a new declaration to be completed – potentially delaying your application.

Dear Australian complying superannuation fund provider

The Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014 was passed on 21 August 2014, allowing Australian superannuation funds to accept a New Zealand statutory declaration as evidence that an individual has permanently emigrated to New Zealand.

ANZ New Zealand Investments Limited has prepared the following New Zealand statutory declaration to help our KiwiSaver members apply to bring their Australian retirement savings to New Zealand.

If you have any questions please contact us at service@anzinvestments.co.nz

I	<input type="text"/>	(Full name of the person making the declaration)
of	<input type="text"/>	
	<input type="text"/>	Postcode
and	<input type="text"/>	

do solemnly and sincerely declare that:

1. I emigrated permanently to New Zealand as noted in section 1 of this form.
2. My current place of residence in New Zealand is the address noted in section 1 of this form.
3. I have opened a ANZ Default KiwiSaver Scheme account.
4. I request and consent to a full withdrawal from my Australian complying superannuation fund detailed in section 1 of this form, to be paid to my ANZ Default KiwiSaver Scheme account.
5. I discharge the trustee of my Australian complying superannuation fund of all further liability in respect of the benefits paid and transferred to my ANZ Default KiwiSaver Scheme account.
6. I understand that the withdrawal amount from my Australian complying superannuation fund will be paid in Australian dollars and that the exchange rate between Australian and New Zealand dollars at the time my Australian savings are converted will affect the amount that is credited to my ANZ Default KiwiSaver Scheme account.
7. I am aware I can ask my Australian complying superannuation fund for information about any fees or charges that may apply, or any other information about the effect of this transfer.

AND I MAKE this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957 (New Zealand).

Signature of the person **making** the declaration

Declared at (location)

on this date

D	D	M	M	2	0	Y	Y
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Before me: (signature, occupation and address of the person in front of whom the declaration is made)

Full name

Address

Postcode

Occupation

Signature of the person **taking** the declaration