

# Application for withdrawal – retirement

## Aon KiwiSaver Scheme

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### Introduction

You can request a retirement withdrawal when you reach your KiwiSaver end payment date. Your KiwiSaver end payment date is the later of the date:

- you reach New Zealand superannuation qualification age (currently age 65); or
- on which you have been a member of any KiwiSaver scheme and/or a member of a complying superannuation fund for five years.

A complying superannuation fund is a superannuation scheme that, while not a KiwiSaver scheme, has similar rules including locking-in benefits until your KiwiSaver end payment date and has been approved by the Financial Markets Authority as a complying superannuation fund.

If you have transferred funds from an Australian complying superannuation scheme to your Aon KiwiSaver Scheme account, you can request a withdrawal of these funds after you have reached the age of 60 and where you meet the definition of “retirement” under Australian legislation.

Payments are subject to any minimum payment requirements set by us at the time and currently can be:

- a regular amount specified by you (a minimum of \$100 per payment) paid into your bank account until your member’s account balance reaches zero or you request that payments stop; and/or
- one or more one-off payments (a minimum of \$500 per payment).

You can find out more about setting up regular payments, any minimum payment requirements that apply, and any terms and conditions applying to withdrawals by contacting the administrator using the contact details below or by visiting [aonkiwisaver.co.nz](http://aonkiwisaver.co.nz). We will also require you to complete an AML Identity Verification form which is available on our website [aonkiwisaver.co.nz](http://aonkiwisaver.co.nz).

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### Section A: Personal details

IRD number -- Member number AON

Date of birth //

Title:  Mr  Mrs  Miss  Ms Other

Given name(s)  Surname

Postal address  Postcode

Direct phone  Mobile

Email

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## Section B: Withdrawal request

Please attach a pre-printed bank deposit slip showing the bank account you would like the funds deposited into. This payment can only be made into your personal bank account as we do not make payments to third parties. Payments will only be made in New Zealand dollars to a New Zealand bank account.

regular withdrawal (minimum \$100)  weekly / fortnightly / monthly\*  
(amount)

partial withdrawal (minimum \$500)   
(amount)

full withdrawal of all available funds (note payment will be made within 5 business days of receiving the final member tax credits from Inland Revenue)

\* Weekly and fortnightly withdrawals will be processed on a Tuesday, with the payment made up to two business days after. If the Tuesday falls on a non-business day, your payment will be processed the next business day with payment made up to two business days after.

Monthly withdrawals will be processed on the 13th of each month with payment made up to two business days after. If the 13th falls on a non-business day, your payment will be processed the next business day with payment made up to two business days after.

Bank account name

Bank account number

### Have you transferred money from a UK Pension Scheme after 5 April 2006?

No  Yes – please contact us for information. An extra withdrawal form is required

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## Section C: Privacy

The information in this form, and in any documents relating to it, is being collected for the purposes set out in this form, including effectively managing your Aon KiwiSaver Scheme account. The information may be used by, and disclosed to, the Manager and the Supervisor of the Scheme, authorised agents, and to any other entity that is involved in the administration and management of the Scheme (including Inland Revenue and any regulatory body). You agree that the Supervisor, the Manager and their authorised agents may collect and use the information for these purposes. The information is being collected by Aon Saver Limited whose address is Level 16, AMP Centre, 29 Customs St West, Auckland and will be held by Link Market Services Limited at Level 11, Deloitte Centre, 80 Queen Street, Auckland. You can request access to your personal information and can ask to correct that information by calling 0800 266 463.

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**Section D: Your statutory declaration**

Please complete the relevant check boxes and sign the statutory declaration below in the presence of a person authorised to take a statutory declaration.

Note: All members please complete question 1. If you have transferred funds from an Australian Superannuation Scheme and are applying to withdraw all or some of these funds please also complete question 2. Please complete this section only if this is the first time you are applying for a retirement withdrawal from the Aon KiwiSaver Scheme.

I, , of   
(Name) (Residential address)  
, solemnly and sincerely declare that:  
(Occupation)

1.  I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver; **or**  
 I was living overseas for the following dates / /  to / /   
and I understand I do not qualify to be paid the Member Tax Credit for this period.
2. Where relevant, I would like to withdraw some or all of my Australian Superannuation Scheme funds and:  
 I am aged 60 or over; and I have retired from being gainfully employed. I do not intend to be gainfully employed in future, on either a full-time or part-time basis.
3. I have read and understood the privacy statement in Section C and all information I have provided in this application and attached documents (if any) is true and correct
4. I understand that the value of my withdrawal will be based on the unit price(s) at the date my request is processed and that fees, taxes and expenses may be deducted.
5. I acknowledge that on receipt of the benefit I have requested above:
  - My interest in the Scheme will be reduced by the amount I have elected to partially withdraw; or
  - I will have no further interest in the Scheme where I have elected to fully withdraw my benefit; and
  - I will have no further claims against the Scheme in respect of the benefit paid; and
  - I understand that my account will be closed when my account balance reaches \$0

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

Signature   
(your signature)

Declared at   
(location)

Date / /

Before me (JP, Solicitor, Notary Public or other person authorised to take a statutory declaration, such as the Registrar or Deputy Registrar of the High Court or of any District Court or a member of parliament):

Full name  Occupation   
Signature  Declaration taker's details/stamp

## Checklist

I have:

- completed all Sections of the form
- signed and dated Section D - i.e., the Statutory Declaration
- had Section D duly completed in the presence of a person authorised to take a statutory declaration

I attach:

- a pre-printed bank deposit slip or bank statement showing the account name and number into which payment is requested to be made
- a completed AML form

Please return the completed form and documentation to:

**Freepost Aon Retirement Saving**

Aon KiwiSaver Scheme, P O Box 332, Shortland St, Auckland 1140.

If you have any questions about completing this form, please call 0800 AON INFO (0800 266 463).