

Application for transfer - Permanent emigration to Australia

Aon KiwiSaver Scheme

Use this form to apply to transfer funds from your account if you have permanently emigrated to Australia. You will be eligible to transfer your KiwiSaver savings to an Australian complying superannuation scheme if you have left New Zealand to live permanently in Australia and the Australian complying superannuation scheme you are transferring to accepts your transfer.

We will also require you to complete an AML Identity Verification form which is available on our website www.aonkiwisaver.co.nz.

Section A: Personal details

IRD number - -

Member number A O N

Date of birth / /

Title: Mr Mrs Miss Ms Other

Given name(s) Surname

Postal address Postcode

Direct phone Mobile

Email

Section B: Australian complying superannuation scheme details

Membership number

Australian tax file number
(If unknown visit the Australian Tax Office website www.ato.gov.au)

Superannuation Product Identification number

Australian Business Number (ABN)

Australian provider name

Australian Superannuation Scheme name

Postal address

Postcode Direct phone

Email

Please note: In order to process your transfer, we will need to receive a letter from your Australian superannuation provider, on their letterhead, confirming:

- that they are willing to accept a transfer payment from a KiwiSaver scheme into your member account in the scheme; and
- if your funds include any UK Pension transfers that they are a QROPS registered scheme; and
- the bank details to be used for the transfer payment (including any reference details needed)

Section C: Trans-tasman permanent emigration transfer instructions

I have permanently emigrated to Australia and request my KiwiSaver balance to be transferred to my member account in the Australian complying superannuation scheme named above. The bank account details of the Australian superannuation scheme are below.

Bank account name

Bank name

Bank account number

SWIFT code

BSB Code

Payment reference 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

Section D: 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.

Section E: Your statutory declaration

I, , of
(Name) *(Residential address)*

, solemnly and sincerely declare that:
(Occupation)

- I permanently emigrated from New Zealand to Australia on / /
and have been resident in Australia since / / ; **and**
- 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 and I understand I do not quality to be paid the Member Tax Credit for this period
/ / to / /

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Section E: Your statutory Declaration (continued)

3. I apply to the Manager of the Scheme to withdraw the balance of my KiwiSaver account and I understand that:
- a withdrawal of my KiwiSaver account balance in the case of permanent emigration is subject to the Manager's approval; and
 - before my application is approved I am required to:
 - complete the statutory declaration contained in this form;
 - provide proof of the date I left New Zealand (e.g., copies of airline tickets, passport other documentation showing departure); and
 - provide evidence of my Australian residential address (e.g., utility bill, bank statement etc.); **and**
4. 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 have read and understood the privacy statement set out in Section D and all information I have provided in this permanent emigration application form 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
(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

Section F: Consent and signature

The information in this form and any required supporting documentation is being collected so a decision can be made regarding your transfer request. The Manager and its associated companies and the Trustee have access to this information. Access is subject to strict security arrangements, and the Trustee and the Manager will comply with the Privacy Act 1993 when dealing with this information. Please read the Aon privacy statement on our website www.aonkiwisaver.co.nz for further details.

- I understand that any information I give to the Manager may be passed on to my chosen Australian superannuation scheme as reasonably required and I authorise the Manager to give such information in relation to this transfer as is requested by my chosen Australian superannuation scheme.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian superannuation scheme, and that I am liable for any such tax consequences.
- I acknowledge that the Manager has recommended that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- I understand that my Aon KiwiSaver Scheme account will be closed upon my Aon KiwiSaver Scheme savings being transferred to my chosen Australian superannuation scheme.
- I understand that following a transfer of my KiwiSaver savings to an Australian superannuation scheme I will not be able to transfer them to a third country.

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Section F: Consent and signature (continued)

- I understand that my application is subject to the Manager’s 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 named in section B of this application cannot accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian superannuation scheme, the Manager, the Supervisor and the administrator of the Aon KiwiSaver Scheme will be released from all liabilities in respect of my membership in the Aon KiwiSaver Scheme.
- I understand that the “New Zealand sourced” savings in my Australian superannuation scheme will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (currently 65).
- I understand that once my Aon KiwiSaver Scheme savings have been transferred to Australia, they will become (with a few exceptions) subject to the standard rules and regulations governing the Australian superannuation scheme.
- I understand the Australian superannuation scheme may require additional information from me before my application is processed.

Signature

Date / /

Checklist

I have:

- completed all sections of this form
- signed and dated Sections E and F
- had Section E duly completed in the presence of a person authorised to take a statutory declaration.

I attach:

- proof of the date I left New Zealand and emigrated to Australia (e.g., copies of airline tickets, passport other documentation showing departure)
- evidence of my Australian residential address (e.g., utility bill, bank statement etc.)
- a letter from my superannuation provider, confirming that they are willing to accept the transfer, their bank account details, and if your funds include UK Pension transfers that they are a QROPS registered scheme (as detailed in Section C)
- a completed AML identity verification 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).