

# Trans Tasman Transfer Application Form

Please post this form to: **Fisher Funds Management Limited, Private Bag 93502, Takapuna, Auckland 0740.**

If you would like help in completing this form, please email [kiwisaver@fisherfunds.co.nz](mailto:kiwisaver@fisherfunds.co.nz) or phone us on **0800 FF KIWI (0800 335 494).**

## Who should complete this form?

Please use this form to transfer your KiwiSaver Scheme savings to a complying Australian Superannuation fund. You are eligible to transfer your KiwiSaver Scheme savings if you have left New Zealand to live permanently overseas and the Australian Superannuation fund you are transferring to accepts transfers from New Zealand KiwiSaver Schemes. If you haven't done so already, please check with your Australian provider that this is the case before completing all sections below.

## Checklist

- ☐ Complete sections 1-4
- ☐ Complete the Statutory Declaration in section 5 in front of a Justice of the Peace, Solicitor, Notary Public or other person authorised to take statutory declarations.

You can find a Justice of the Peace near you by visiting the New Zealand's Justices' Association website [www.jpfed.org.nz](http://www.jpfed.org.nz) or Yellow Pages [www.yellow.co.nz](http://www.yellow.co.nz). He/she will be able to certify your ID and witness your statutory declaration. You can also call Yellow's Directory Assistance on 018 (note charges up to about \$1 apply).

### Statutory declaration made outside New Zealand

A declaration made in a Commonwealth country other than New Zealand shall be made before a Judge, a Commissioner of Oaths, a Notary Public, a Justice of the Peace, or any person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding, or before a Commonwealth representative, or before a solicitor of the High Court of New Zealand.

A declaration made in a country other than a Commonwealth country shall be made before a Commonwealth representative, a Judge, a Notary Public, or a solicitor of the High Court of New Zealand.

We require the following documentation which does not need to be certified:

- ☐ A copy of your passport, New Zealand drivers license or firearms license.
- ☐ Proof of your Australian Superannuation fund's bank account. It must show the bank account name, bank account number, swift code and logo of the bank.
- ☐ A letter from your Australian Superannuation fund confirming that they accept KiwiSaver transfers.
- ☐ Evidence of your permanent residence at an Australian address, for example:
  - a copy of a property sale and purchase agreement; or
  - tenancy/leasing agreement for an overseas property; and
  - recent utility bill; or
  - bank statement
- ☐ Evidence of your departure from New Zealand, for example:
  - evidence of confirmed travel arrangements; or
  - passport evidence; or
  - evidence of any necessary visas or shipping contracts/documentation; or
  - evidence of Australian employment, i.e. a copy of a contract or letter from your Australian employer; or
  - evidence of your Australian tax status issued by the relevant Australian tax authority.

## Section 1: Your Details

Title	First Name/s		
<input type="text"/>	<input type="text"/>		
Surname	<input type="text"/>		Date of Birth
<input type="text"/>	<input type="text"/>		<input type="text"/> / <input type="text"/> / <input type="text"/>
Address			
<input type="text"/>			
City	Country	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home Phone	Work Phone	Mobile	
<input type="text"/> ( <input type="text"/> )	<input type="text"/> ( <input type="text"/> )	<input type="text"/> ( <input type="text"/> )	
Email Address			
<input type="text"/>			
Fisher Funds KiwiSaver Scheme Member Number		Prescribed Investor Rate (PIR) (please tick one)	
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		<input type="text"/> 10.5% <input type="text"/> 17.5% <input type="text"/> 28%	
IRD Number			
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			

*Note: before processing this transfer, if approved, if any of the tax payment details differ from what we currently have on record, they will be updated based on the new information provided. Please go to [www.fisherfunds.co.nz/pircalculator](http://www.fisherfunds.co.nz/pircalculator) to work out your PIR, however if you have been residing outside of New Zealand for more than 325 days you will be a non-resident for tax purposes and the PIR of 28% will apply.*

## Section 2: Complying Australian Superannuation Fund Details

Member Number	Australian Business Number (ABN)
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>
<b>Member Reference</b>	
Australian Provider Name	
<input type="text"/>	
Postal Address	
<input type="text"/>	
Phone Number	Email Address
<input type="text"/> ( <input type="text"/> )	<input type="text"/>

### Section 3: Trans Tasman Permanent Emigration Transfer Instructions

I have permanently emigrated to Australia and request my KiwiSaver Scheme balance to be transferred to my account in the Australian Superannuation fund named above.

Date you left New Zealand

  

#### Payment Details

Australian Provider Bank Name

Sort Code

Swift Code

Account Number

               

Bank

Branch

Account Number

Suffix

### Section 4: Consent and Signature

I agree that Fisher Funds Management Limited, the Trustee and any of their respective related entities may collect and use the information set out in (or in connection with) this form for the purpose for which it is provided. Additionally, they may use that information to promote to me other products and services of the Fisher Funds group of companies. We will provide you (on request) with the name and address of any entity to which information has been disclosed. If you do not provide the information required by this form, we may not be able to process your request. You have the right to access all personal information held about you. If any of the information is incorrect, you have the right to have it corrected. The information set out in this form will be collected and held by Fisher Funds whose address is Level 1, Crown Centre, 67-73 Hurstmere Road, Takapuna, Auckland 0622.

- I understand that any information I give to Fisher Funds may be passed on to my chosen Australian Superannuation fund as reasonably required and I authorise Fisher Funds to give such information in relation to this transfer as requested by my chosen Australian Superannuation fund.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian Superannuation fund, and that I am liable for any such tax consequences.
- I acknowledge that Fisher Funds 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 any annual Government contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to the Commissioner of Inland Revenue.
- I understand that my Fisher Funds KiwiSaver Scheme account will be closed upon my savings being transferred to my chosen Australian superannuation fund.
- I understand that following a transfer of my Fisher Funds KiwiSaver Scheme savings to an Australian superannuation fund I will not be able to transfer them to a third country.
- I understand that my application is subject to the approval of Fisher Funds and that Fisher Funds may request additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian Superannuation fund named in section 2 of this application does not accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian Superannuation fund, Fisher Funds and the Trustee will be released from all liabilities in respect of my membership in the Fisher Funds KiwiSaver Scheme.
- I understand that the "New Zealand sourced" savings in my Australian Superannuation fund will not be able to be accessed until the age of eligibility of New Zealand Superannuation is reached (currently 65).
- I understand that once my Fisher Funds KiwiSaver Scheme savings have been transferred to Australia, they will become (with a few exceptions) subject to the rules and regulations governing the Australian Superannuation fund.

I confirm that for the period that I have been a member of KiwiSaver, my principal place of residence was New Zealand except for the periods:

From

  

To

  

From

  

To

  

From

  

To

  

Your Signature

Date

## Section 5: : Statutory Declaration

I,

Name

of

Address

Occupation

**solemnly and sincerely declare that:**

- I have permanently emigrated from New Zealand to Australia and have no intention of returning to live in New Zealand permanently.
- I have accurately reflected above the dates during which my principal place of residence was not New Zealand.

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

Your Signature

**Declared at**

Address

Date

/  /

**Before Me**

Name

Capacity e.g. Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration.

Signature