

The Kiwibank KiwiSaver Scheme Deceased Estate Withdrawal Form

Kiwibank Investment Management Limited, Private Bag 39888, Wellington 5045

1 Description

Use this form to apply for a withdrawal of Kiwibank KiwiSaver Scheme contributions if you are the Personal Representative(s) or a Lawyer acting on behalf of a deceased Kiwibank KiwiSaver Scheme member.

This form should be completed where:

- the Deceased left a Will, this means the form will be completed by the person(s) who has been granted Probate, or
- where the Deceased did not leave a Will, the form will be completed by the person(s) who has been granted Letters of Administration.

Balances under \$15,000 (where applicable) and claimants under Section 65 Administration Act 1969.

Please note where Probate/Letter of Administration are not required to be applied for and the value of the amount available for withdrawal is less than \$15,000, any of the persons set out below may be entitled to complete this form:

- Wife
- Husband
- Civil union partner
- Defacto partner
- Child
- Person beneficially entitled to estate under the Will or on intestacy
- Person appearing to be entitled to obtain administration of estate in New Zealand
- Person related by blood, marriage or civil union to the deceased who undertakes to maintain the children of that person who are minors, and
- Person who has custody and control of the children of the deceased who are minors

Where there are more than three Personal Representatives, please complete and attach an additional form.

2 Requirements

This application must include:

- a certified copy of the Death Certificate; and either
 - where the Deceased left a Will – a certified copy of the grant of Probate; or
 - where the Deceased did not leave a Will and if balance is over \$15,000 – a certified copy of the Letters of Administration
- evidence of the relationship to the deceased e.g. marriage/birth certificate
- certified copies of a passport or drivers licence showing the signature for each claimant or personal representative
- a bank deposit slip for the account to be credited.

Copies of each of the documents must be certified as true copies by a solicitor, Justice of the Peace, Notary Public or any other person authorised to take a statutory declaration.

Please note that the Manager will adjust your withdrawal transaction for any tax liability arising as a result of the withdrawal request.

The withdrawal will be processed at the unit price effective on the day your withdrawal is processed.

If the form doesn't provide enough space for all your information, please attach extra pages.

Please remember to cancel any direct debits or automatics payments to the Kiwibank KiwiSaver Scheme.

3 Privacy

The information in this form is being collected for the purposes of effectively managing the deceased member's Kiwibank KiwiSaver Scheme account and it will be held by Kiwibank Investment Management Limited. It may be disclosed to third parties to the extent that's necessary to administer the deceased member's withdrawal from the Scheme.

4 Deceased member's personal details continued

Please print your details clearly in CAPITAL letters, using a pen

Title Mr Mrs Ms Dr Other (please specify)

First name(s)

Surname

Date of birth

Physical address

Number and street

Suburb

City or town Postcode

Postal address (if different from above)

Number, street and suburb

City or town Postcode

Phone numbers

Work Home

Mobile

Email address

Kiwibank access number

IRD number

5 Details of all Personal Representatives or Lawyer acting on behalf

Please print your details clearly in CAPITAL letters, using a pen

Name of Personal Representative:

Address

Number, street and suburb

City or town Postcode

Phone numbers

Work Mobile

Email address

Name of Personal Representative:

Address

Number, street and suburb

City or town Postcode

Phone numbers

Work Mobile

Email address

Name of Personal Representative:

Address

Number, street and suburb

City or town Postcode

Phone numbers

Work Mobile

Email address

6 Withdrawal details

By credit to the account of

Account number

Bank Branch Account number Suffix

Payment will only be made to New Zealand bank accounts.

7 Declaration continued

Full Name

Signature

Declared at on

Before me
Justice of the Peace, solicitor, notary public or other person authorised to take a statutory declaration.

Full Name

Signature Date

Full Name

Signature

Declared at on

Before me
Justice of the Peace, solicitor, notary public or other person authorised to take a statutory declaration.

Full Name

Signature Date

8 What next?

Post or email this form and all supporting documentation to:

Kiwibank Limited
Private Bag 39888
Wellington 5045
Attention: Wealth Management Team
or
kbksproduct@kiwibank.co.nz

9 Checklist

Before returning this application, please ensure that:

- You've completed all sections of the form and make the statutory declaration in the required manner
- You've provided
 - a certified copy of the Death Certificate; and either
 - where the Deceased left a Will – a certified copy of the grant of Probate; or
 - where the Deceased did not leave a Will and if balance is over \$15,000 – a certified copy of the Letters of Administration
- Evidence of the relationship to the deceased e.g. marriage/birth certificate
- Certified copies of a passport or drivers licence showing the signature for each claimant or personal representative
- A bank deposit slip for the account to be credited.