Application to transfer super benefits to a KiwiSaver scheme



Use this form if you want to transfer your full benefit to a KiwiSaver scheme account.

NOTE: You can only start the transfer process once you have permanently emigrated to New Zealand and you have opened a KiwiSaver scheme account that will accept your Australian superannuation benefit.

Please use a dark pen and CAPITAL letters, or type directly into this form online, print it and send it to us. Use (X) to mark boxes.

If you have any questions, please call us on **1300 650 873**.

* Please provide a certified copy of a utility bill for basic household amenities, such as water, electricity or gas, providing evidence of your name and current address in New Zealand.

1. Your personal detail				
1ember number	Title	MF	Date of birth (I	DD-MM-YYYY)
ast name				
iven name(s)		<u> </u>		
ast residential address in Australia				
uburb			State	Postcode
				FUSICULE
ermanent address in New Zealand ³	*			
ity/town				Postcode
Daytime contact number	Tax file number (se	e Notes on pa	ge 5)	

Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)

2. Receiving KiwiSaver scheme account details

Name	of K	iwi	Save	er so	hen	ne																					
Postal schem																		r fro	m t	he l	≺iwi	Save	er s	che	eme,	or a	ny
City/to	own																								Pos	tcoc	le
Count	ry																		Со	ntac	t nu	imb	er				
Email																											
KiwiSa	aver s	sche	eme	e reg	istra	itio	n no	. (fro	٥m	/oui	⁻ Kiv	viSa	ver	prov	vide	r)	Kiw	iSav	/er a	ассо	ount	nur	nbe	er			
Your Ir	nland	d Re	ever	nue	Dep	arti	mer	nt (IF	RD) ı	านท	nber																
]													

You must open the KiwiSaver account before requesting a transfer. We will need to confirm that the scheme account is registered.

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Cheques to the KiwiSaver fund will be issued in Australian dollars. You may be charged a conversion fee by the receiving fund.

3. Statutory declaration

You can make a statutory declaration under the Commonwealth of Australia Statutory Declarations Act 1959 or under the New Zealand Oaths and Declarations Act 1957. Please tick the appropriate declaration and ensure the appropriate witness for the declaration is used. See Laws governing Commonwealth and New Zealand statutory declarations on page 5.

- I, ______ make this declaration under the Commonwealth of Australia Statutory Declarations Act 1959.
- I am a former resident of Australia and I have emigrated permanently to New Zealand
- I have elected to open a KiwiSaver scheme account and transfer my superannuation benefits from Australia to New Zealand
- I request and consent to the payment of my full superannuation benefit to the nominated KiwiSaver account
- I have sufficient information to make an informed decision about the transfer of my benefit from First State Super
- I understand that a \$36 exit fee will be applied to my transfer

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under Section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this form are true in every particular.

OR

You witr this sam I, ______ declare that:

- I am a former resident of Australia and I have emigrated permanently to New Zealand
- I have elected to open a KiwiSaver scheme account and transfer my superannuation benefits from Australia to New Zealand
- I request and consent to the payment of my full superannuation benefit to the nominated KiwiSaver account
- I have sufficient information to make an informed decision about the transfer of my benefit from First State Super
- I understand that a \$36 exit fee will be applied to my transfer

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

	Declared at														
	this (eg. 13th) day of (month)	in the year													
and your less must sign form on the e day.	Signature of member	Date (DD-MM-YYYY)													
	Before me (print name of witness in BLOCK LETTERS)														
	Signature of witness	Date (DD-MM-YYYY)													
	Qualification of witness														
	Address														
	City/town	Postcode													
	Country														

solemnly and sincerely

4. Proof of identity

You must provide **certified proof of identity** before your funds will be released, unless you have already provided this information within the last 12 months. If any of your personal details (i.e. name, postal or email address, bank account etc.) have changed in the past 12 months, or the identification documents you have previously provided have expired, you will need to resubmit updated certified proof of identity to us. We can request current certified proof of identification if this is considered necessary.

Primary identification documents

Please forward a certified copy of **ONE** of the following documents (see page 4 for a list of alternative documents and certification requirements):

- current Australian passport
- current foreign passport or similar travel document containing your photograph and signature*

Secondary identification documents

If you cannot provide one of the four PRIMARY identification documents listed above, then you must provide **TWO** certified SECONDARY documents. See page 4 for details.

* Documents written in a language other than English must be accompanied by an English translation prepared by an accredited translator.

5. Privacy of information

The personal information you provide on this form is collected by and held for First State Super by the fund administrator, Pillar Administration, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering your account and providing you with services associated with your fund membership . For further information about how your personal information is handled, please phone us on 1300 650 873 or visit firststatesuper.com.au/privacyandgovernance to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about how your personal information about a breach of your privacy and other important information about how your personal information is collected, used and disclosed.

Send the form to this address.

6. Where to send your completed form

Return the completed form to First State Super PO Box 1229 WOLLONGONG NSW 2500.

Notes



Proof of identity

Collect your originals

To protect your benefit entitlement and ensure your privacy is maintained, you must provide certified documentation verifying your identity before your application can be processed. This is a three-step process:

Photocopy your originals

properly certified.

Photocopied originals must be

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Collect your proof of identity document(s). We have listed the documents you can use below.

You can provide:

Either:

A <u>certified</u> copy of <u>one</u> of the following documents:

- current Australian passport
- current foreign passport or similar travel document containing a photograph and the signature of the person.*

Or:

<u>One</u> certified document **AND** from this list:

- an Australian birth certificate or extract
- an Australian citizenship certificate issued by the Commonwealth.

One certified document from this list:

Certify your photocopies

Take your photocopies and your

original documents to a person

who can certify documents. A list of

authorised certifiers and certification guidelines are included under

Certification of personal documents.

- a notice issued by the ATO within the last 12 months that shows your name and current residential address and the provision of financial benefits to the individual e.g. your last tax return
- a notice issued by utilities provider in the last three month e.g. rates notice, electricity or water bill.

* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

Have you changed your name?

If you have changed your name, you will need to provide one of the following certified documents:

- marriage certificate issued by the Births, Deaths and Marriages Registration Office (please don't send your ceremonial certificate as this cannot be accepted)
- Deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name on divorce, we will require a divorce certificate and a link document such as your marriage certificate showing your original maiden name.

For other acceptable name change documents, please contact us.

Certification of personal documents

All copied pages of original POI documents (including any change of name documents) need to be certified as true copies by an authorised person (see below). The authorised person must sight the original and the copy to ensure both documents are identical, then make sure all pages have been certified by writing 'I certify that this document is a true copy of the original', followed by their signature, printed name, qualification (e.g. Justice of the Peace, notary public, etc.) and date. The following people can certify copies of the originals.

If you are outside Australia, you can still have copies of your documents certified by consular staff at an Australian:

- Embassy
- High Commission
- Consulate.

If you are unable to reach an Australian Embassy, High Commission or Consulate, your documents can be certified by a:

- notary public
- Justice of the Peace
- Judge of the court
- Registrar or deputy registrar of a court.

Samantha Sample has provided a copy of her identification that included signature, full name, date of birth and current residential address.

The authorised person has sighted the original identification, and confirmed that the copy is a certified true copy.

Details for the authorised person are included: full name, qualification, registration number (if applicable), date and signature.

Drive	r Licence	
Samantha SAMPLE		Card Number 2 123 456 789
123 ANY ST SUBURB NSW 2000	DL	
icence No. 12345678 icence Class		
c s Sianature		
Saloure	Date of Birth 01 JAN 1980	Expiry 01 JAN 2015

"I certify that this document is a true copy of the original."

K Anderson

Name: Kate Anderson Qualification: JP Registration no: 123456 Date: 31 March 2013

Witnesses for an Australian Commonwealth Statutory Declaration

Only certain people may witness a Commonwealth statutory declaration. A list of people who can be witnesses is set out in Schedule 2 to the Statutory Declarations Regulations 1993 which can be accessed via the following link: **www.ag.gov.au/Publications/Pages/Statutorydeclarations.aspx**. Generally, they must have some connection to Australia. For instance a doctor who is registered to practise medicine in Australia may witness a Commonwealth statutory declaration when he or she is overseas but a doctor who is registered to practise medicine in a foreign country (and not in Australia) cannot witness a Commonwealth statutory declaration.

To make a Commonwealth statutory declaration overseas, you should be able to contact a person listed under Schedule 2 as an authorised witness at the nearest Australian Embassy, High Commission or Consulate. You may be charged a fee for this service. For details of an Australian Consulate close to you, go to www.dfat.gov.au/missions.

Witnesses for a New Zealand statutory declaration

Only certain people may witness a New Zealand statutory declaration. A list of people who can be witnesses is set out in Section 9 to the New Zealand Oaths and Declarations Act 1957 which can be accessed via the following link: http://www.legislation.govt.nz/act/public/1957/0088/latest/DLM314553.html

Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to the Commissioner of Taxation or to another superannuation provider when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other trustee. It is not compulsory to provide your TFN but if you don't, you may pay additional tax and your contributions may not be accepted.



- Have you confirmed that your New Zealand KiwiSaver account can accept a transfer of your super money?
- Have you enclosed a certified copy of a utility bill?
- Have you enclosed an original letter/document from the KiwiSaver Fund showing their postal address?
- Have you had your statutory declaration witnessed by an authorised witness under the relevant statutory declaration.
- Have you enclosed a copy of a listed POI document(s), certified by an authorised certifier?

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