

# Permanent Emigration Withdrawal Form

Use this form if you have permanently emigrated from New Zealand and you have lived overseas for at least 12 months. If you have permanently emigrated to Australia you are not able to apply for a withdrawal on the grounds of permanent emigration. However you will be able to transfer all of your KiwiSaver savings to your Australian superannuation scheme.

**If you would like help in completing this form, please phone Fisher Funds Management Limited on 0800 772 837 (or +64 9 445 3377 if calling from overseas).**

## Member Details

Title  First Name/s

Surname

Address

City  Country  Postcode

Home Phone (  )  Work Phone (  )  Mobile (  )

Email Address

Fisher Funds KiwiSaver Member No.  F  I

IRD Number

## Document Checklist

When returning this form to: **Fisher Funds Management Limited, PO Box 33549, Takapuna, Auckland 0740, New Zealand** please provide:

**Certified\* identity documents (if this has not been previously provided).**  
Please provide one of the following identity options which must be certified (see below for more information):

Option 1 – Passport, New Zealand drivers license or New Zealand firearms license

Option 2 – Birth Certificate or Citizenship Certificate **together with one of the following:**

- » HANZ 18+ Card; or
- » Tertiary student photo ID; or
- » Current international driving permit.

### \*Certifying your identity documents

All copies of identity documents must be completely legible with clear photos. They must also be certified by an Approved Person as being a true reproduction of the original document. A Fisher Funds representative or an Authorised Distributor can copy and certify documents for you. Alternatively you can ask a Justice of the Peace, New Zealand registered lawyer, accountant, teacher or doctor, Police Officer, Notary Public or Member of Parliament who is not related to you, is not your spouse or partner, and does not live at the same address. The Approved Person must view the original document (not a fax, photocopy or scan) before writing their name, occupation, date and signature and a statement as follows: "I certify this to be a true copy of the original document and confirm that it represents the identity of (full name)". Certification is valid for three months.

### Plus the following documentation which does not need to be certified:

- Proof of departure from New Zealand (evidence of confirmed travel arrangements, copy of passport pages showing departure date stamp or evidence of necessary visas).
- Evidence that you have lived at an overseas address at some time during the year following your departure from New Zealand. (A copy of utility bill, bank statement, rental agreement or letter of employment dated within the last three months).
- Proof of your bank account (a bank generated deposit slip or a bank statement dated within the last three months).
- Complete the Statutory Declaration on page 2 in front of a Justice of the Peace Solicitor, Notary Public or other person authorised to take statutory declarations.

## Privacy

I agree that the Trustee and Fisher Funds Management Limited (and 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 Fisher Funds group of companies. Fisher Funds 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, Fisher Funds and/or the Trustee 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 Management Limited and Trustees Executors Limited whose respective addresses are Level 1, Crown Centre, 67-73 Hurstmere Road, Takapuna, Auckland 0622 and Level 5, 10 Customhouse Quay, Wellington 6140.

## Payment Details

We will only make payments in New Zealand dollars to either a New Zealand bank account or an international bank account (the cost of an international transfer is paid by the member).

Name of Bank Account

Swift Code (if an overseas bank account)

Account Number

*Bank Branch Account Number Suffix*

Bank Branch Address

## Statutory Declaration

I,  of   solemnly and sincerely declare that:

*Name Place Occupation*

- » I am member of the Fisher Funds KiwiSaver Scheme.
- » I am applying to the Trustee to withdraw or transfer my balance from the Fisher Funds KiwiSaver Scheme.
- » I understand that if I am withdrawing my Fisher Funds KiwiSaver Scheme funds and not transferring them to a complying Australian superannuation scheme any Member Tax Credit amounts will not be paid to me and will instead be repaid to Inland Revenue. Please call us on 0800 772 837 (or +64 9 445 3377 if you're calling from overseas) if you are unsure what these amounts are.
- » If I am withdrawing my balance I confirm that I permanently emigrated from New Zealand at least 12 months ago.
- » I agree that by withdrawing from the Fisher Funds KiwiSaver Scheme I am ending my membership and all claims that have been made or may be made by me on the Manager and/or the Trustee in relation to the Fisher Funds KiwiSaver Scheme.
- » I understand that my withdrawal value will or might fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my Fisher Funds KiwiSaver Scheme account.
- » The information given in this form is true and correct. I acknowledge that the Manager and the Trustee of the Fisher Funds KiwiSaver Scheme will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against and claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- » I understand that the Manager and/or Trustee of the Fisher Funds KiwiSaver Scheme will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- » I have read the privacy statement in this form.

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

Signature

Declared at   /  /

*Place Date*

### Before Me

Name

In my capacity as a Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration.

Signature