

# Transferring your AUSfund account to your KiwiSaver account

## Are you eligible?

To be eligible to roll your Australian superannuation account to your KiwiSaver account you must meet the following criteria:

- You must have KiwiSaver account
- Your KiwiSaver provider must be able to accept the rollover (receiving monies from Australia is optional, so you need to check with your provider)
- You must have emigrated permanently to New Zealand
- The whole of your balance in your Australian superannuation fund must be transferred (partial rollovers are not allowed)

## Steps you need to follow if you are eligible

### 1. Complete the application form

Please complete the form 'Request to transfer whole balance of superannuation benefits to KiwiSaver Scheme'

Make sure you complete all mandatory fields. If you do not complete all mandatory fields we may not be able to process your request.

### 2. Provide Supporting Documentation

To transfer your Australian superannuation account to your KiwiSaver you must provide the following documentation:

#### a. Proof of residence in New Zealand

You need to provide an official document that shows your current address, for example a copy of your driver licence (if it has your address on it), or a utility bill, council rates notice, or bank statements etc.

#### b. A signed Australian Statutory Declaration or New Zealand declaration stating you have permanently emigrated to New Zealand

Under the laws governing the transfer of Australian superannuation monies to a KiwiSaver Scheme account, you must complete either an Australian Statutory Declaration or New Zealand declaration stating you have permanently emigrated to New Zealand.

## Who can sign an Australian Statutory Declaration?

Australian Statutory Declarations may only be made before a person whose qualification is on the List of Authorised Witnesses able to witness a Commonwealth Statutory Declaration under the Australian Statutory Declaration Act 1953 and Statutory Regulations 1993.

This includes an Australian Consular or Diplomatic Officer at the Australian High Commission in Wellington, or the Australian Consulate-General in Auckland.

The full List of Authorised Witnesses can be found on the Australian Attorney-General's website:

[ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx](http://ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx)

The obligations of a witness can be found at: [ag.gov.au/publications/pages/witnessingastatutorydeclaration.aspx](http://ag.gov.au/publications/pages/witnessingastatutorydeclaration.aspx)

Please note, as stated on the Attorney-General's website:

A person may witness Commonwealth statutory declarations overseas if they:

- Fall within one of the categories on the list of authorised witnesses, and
- Have a connection to Australia.

For example, a member of a police force in Australia may witness a Commonwealth statutory declaration overseas. However, a police officer of a foreign police force cannot witness a Commonwealth statutory declaration.

## Who can sign a New Zealand declaration?

See the attached New Zealand declaration.

## Where can I get additional information?

Phone: **1300 361 798** or if calling from overseas, phone: **+61 3 9814 6400**

Email: [admin@ausfund.net.au](mailto:admin@ausfund.net.au)

Web: [unclaimedsuper.com.au](http://unclaimedsuper.com.au)

## Where do I send my completed forms?

You must send your signed application and Australian Statutory Declaration or New Zealand declaration and proof of residency in New Zealand to:

**The AUSfund Administrator**  
**PO Box 543, CARLTON SOUTH, VIC 3053, AUSTRALIA**

# Request to transfer whole balance of superannuation benefits to KiwiSaver Scheme

## COMPLETING THIS FORM

Read the Fact Sheet

Refer to instructions where indicated with: ⓘ

This form is only for whole (not part) balance transfers.

Use a dark pen and CAPITAL letters. Use ✕ to mark boxes.

## AFTER COMPLETING THIS FORM

Sign the authorisation

Send form and Australian Statutory Declaration or a New Zealand declaration and proof of residency in New Zealand to your FROM (transferring) fund

If you have any questions call **1300 361 798** or email **admin@ausfund.com.au**

NB: \* Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request

### SECTION 1: Personal details

Title: ☐ Mr ☐ Mrs ☐ Ms ☐ Miss

Date of Birth\*:  /  /

Family name\*:

Given names\*:

Other/previous names:

Tax File Number:

Under the **Superannuation Industry (Supervision) Act 1993**, you are not obliged to disclose your tax file number, but there may be tax consequences.

IRD Number\*:

Gender: ☐ Male ☐ Female

Last residential address:

Suburb/Town:

State:

Postcode:

### SECTION 2: Current address in New Zealand (residential, no P.O. Boxes)

Address\*:

Suburb\*:

Town/City\*:

Country: ☒ N ☒ Z

Postcode\*:

Email:

Contact Phone Number:

**Previous address in Australia** ⓘ The address held by your FROM (transferring) fund is:

Address:

Suburb:

State:

Postcode:

### SECTION 3: Fund details

#### FROM (Transferring Fund)

Fund Name\*: **AUSfund**

Fund phone number: **+61 3 9814 6400**

Membership or account number\*:

Australian Business Number: **85 945 681 937**

Unique Superannuation identifier: **APF0100AU**

#### TO (Receiving Fund)

KiwiSaver Scheme name\*:

KiwiSaver Registration number\*:

KiwiSaver phone number\*:

KiwiSaver Membership number\*:

KiwiSaver Scheme Address\*:

⚡ If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

### SECTION 4: Statutory Declaration and Proof of residency in New Zealand

☐ Australian Statutory Declaration or New Zealand declaration stating I have permanently emigrated to New Zealand is attached.^

**AND** ☐ Proof of residence in NZ showing address e.g utility bill, council rates etc is attached.^

### SECTION 5: Authorisation

By signing this request form I am making the following statements: ^

☐ I declare I have fully read this form and the information completed is true and correct.

☐ I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and have obtained or do not require any further information.

☐ I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to my KiwiSaver account.

☐ I request and consent to the transfer of superannuation as described above and authorise the superannuation provider and KiwiSaver account provider to give effect to this transfer.

☐ I wish to transfer my entire benefit to my Kiwi Saver Account.

☐ I have permanently emigrated to New Zealand.

☐ My Kiwi Saver provider has confirmed they can accept this transfer.

Name (Print in BLOCK LETTERS)\*:

Signature\*:

Date (DD/MM/YYYY)\*:

/   /

^ All must be ticked or completed before form can be printed.

# Australian Statutory Declaration - transfer to KiwiSaver

An Australian Statutory Declaration may be made in accordance with either the law of the state or territory in Australia where it is made or the law of the Commonwealth. Some examples of people who can sign an Australian Statutory Declaration are an Australian: Justice of the Peace, a Solicitor or Barrister holding a current practicing certificate, a Notary Public and members of the police force (in some states).

**Important note:** A person who intentionally makes a false statement in a Australian Statutory Declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years – see section 11 of the Statutory Declaration Act 1959.

**Important: Please note New Zealand Justices of the Peace, solicitors etc cannot witness an Australian statutory declaration.**

I,	<input type="text"/>	<input type="text"/>
	First Name	Surname
of	<input type="text"/>	
	Address in New Zealand	
declare that:		
1. I have permanently emigrated to New Zealand		
2. All supporting documents provided with this application are true and correct		
I make this solemn declaration by virtue of the Statutory Declarations Act 1959 as amended and subject to the penalties provided in that Act for the making of false statements in Statutory Declarations, conscientiously believing the statements contained in the declaration to be true in every particular.		
<b>PERSON MAKING THIS DECLARATION:</b>		
Signature:	Name of Signatory:	
	<input type="text"/>	
	(Print in BLOCK LETTERS)	
Signature of person making the declaration		
<b>DECLARED BEFORE ME:</b>		
Signature:	Name of Signatory:	
	<input type="text"/>	
	(Print in BLOCK LETTERS)	
Signature of person witnessing the declaration		
Qualification of Signatory:	Contact Address of Signatory:	
<input type="text"/>	<input type="text"/>	
	(Print in BLOCK LETTERS)	
Signature of person making the declaration		
Date of signature: (DD/MM/YYYY)		
<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

Print Completed Form

## Contact Us:

Telephone: 1300 361 798 (overseas) +61 3 9814 6400  
Facsimile: + 61 8 8205 4990

Email: [admin@ausfund.net.au](mailto:admin@ausfund.net.au)  
Web: [unclaimedsuper.com.au](http://unclaimedsuper.com.au)

# New Zealand Declaration - transfer to KiwiSaver

## 1. A Declaration made in New Zealand may be made before:

- (a) a person enrolled as a barrister and solicitor of the High Court; or
- (b) a Justice of the Peace; or
- (c) a notary public; or
- (ca) the Registrar or a Deputy Registrar of the Supreme Court; or
- (d) the Registrar or a Deputy Registrar of the Court of Appeal; or
- (e) a Registrar or Deputy Registrar of the High Court or a District Court; or
- (f) some other person authorised by law to administer an oath; or
- (g) a member of Parliament; or
- (h) a person who-
  - (i) is a fellow of the body (incorporated under the Incorporate Societies Act 1908) that, immediately before the commencement of the Oaths and Declarations Amendments Act 2001, was called the New Zealand Institute of Legal Executives; and

- (ii) is acting in the employment of the holder of a practising certificate as a barrister and solicitor of the High Court; or
- (i) an employee of the New Zealand Transport Agency, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette; or
- (ia) an employee of Public Trust constituted under the Public Trust Act 2001, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette; or
- (j) an officer in the service of the Crown, or of a local authority within the meaning of the Local Government Act 2002, authorised for that purpose (by name, or as the holder for the time being of a specified office or title) by the Minister of Justice by notice in the Gazette.

I, <input type="text"/>	<input type="text"/>
First Name	Surname
of <input type="text"/>	<input type="text"/>
Place of abode	Occupation

### solely and sincerely declare that:

1. I have permanently emigrated to New Zealand
  2. All supporting documents provided with this application are true and correct
- And I make this solemn declaration conscientiously believing the same to be true by virtue of the Oaths and Declarations Act 1957.

### PERSON MAKING THIS DECLARATION:

#### Signature:

Signature of person making the declaration

#### Name of Signatory:

(Print in BLOCK LETTERS)

### DECLARED BEFORE ME:

#### Signature:

Signature of person making the declaration

#### Name of Signatory:

(Print in BLOCK LETTERS)

#### At (Place):

#### Qualification of Signatory:

Signature of person making the declaration

#### Contact Address of Signatory:

(Print in BLOCK LETTERS)

#### Date of signature: (DD/MM/YYYY)

[Print Completed Form](#)

### Contact Us:

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