

Application for transfer - Permanent emigration to Australia

Aon KiwiSaver Scheme

Use this form to apply to transfer funds from your account if you have permanently emigrated to Australia. You will be eligible to transfer your KiwiSaver savings to an Australian complying superannuation scheme if you have left New Zealand to live permanently in Australia and the Australian complying superannuation scheme you are transferring to accepts your transfer.

We will also require you to complete an AML Identity Verification form which is available on our website aonkiwisaver.co.nz.

Section A: Personal details

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"/> <input type="text"/>	Member number	<input type="text"/> A <input type="text"/> O <input type="text"/> N <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Title:	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/>		
Given name(s)	<input type="text"/>		Surname <input type="text"/>
Postal address	<input type="text"/>		Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Direct phone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		

Section B: Australian complying superannuation scheme details

Membership 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"/>	Australian tax file number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
		<small>(If unknown visit the Australian Tax Office website www.ato.gov.au)</small>	
Superannuation Product Identification 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"/>		
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"/>		
Australian provider name	<input type="text"/>		
Australian Superannuation Scheme name	<input type="text"/>		
Postal address	<input type="text"/>		
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Direct phone	<input type="text"/>
Email	<input type="text"/>		

Please note: In order to process your transfer, we will need to receive a letter from your Australian superannuation provider, on their letterhead, confirming:

- that they are willing to accept a transfer payment from a KiwiSaver scheme into your member account in the scheme; and
- if your funds include any UK Pension transfers that they are a QROPS registered scheme; and
- the bank details to be used for the transfer payment (including any reference details needed)

Section C: Trans-tasman permanent emigration transfer instructions

I have permanently emigrated to Australia and request my KiwiSaver balance to be transferred to my member account in the Australian complying superannuation scheme named above. The bank account details of the Australian superannuation scheme are below.

Bank account name

Bank name

Bank account number

SWIFT code

BSB Code

Payment reference number

Have you transferred money from a UK Pension Scheme after 5 April 2006?

No Yes – please contact us for information. An extra withdrawal form is required.

Section D: Privacy

The personal information you are providing in this form, (or in connection with this form) is being collected for the main purpose of effectively administering and managing your Aon KiwiSaver Scheme account in compliance with all relevant law. If you do not provide us with your personal information, we may not be able to process or may refuse your application. The information may also be used for the purpose of verifying your identity electronically or providing you with information about products and services we think might be of interest to you (including from our parent company Fisher Funds). The information may be used by, and disclosed to the supervisor, the Manager (Aon Saver Limited), the Administration Manager, or other entity involved in the administration and management of the Aon KiwiSaver Scheme (including Inland Revenue and any regulatory body) or your financial adviser. The information you provide may also be used by external agencies appointed by us for the purposes of verifying your identity.

You agree that this information may be collected, held and disclosed for these purposes. The information is being collected by the Manager (Aon Saver Limited), whose address is PO Box 332 Shortland Street, Auckland 1140, and will be held by Link Market Services Limited who you can contact at PO Box 332 Shortland Street, Auckland 1140. You can request access to your personal information and can ask that it is corrected by calling 0800 266 463.

Section E: Your statutory declaration

I, , of
(Name) *(Residential address)*

, solemnly and sincerely declare that:
(Occupation)

- I permanently emigrated from New Zealand to Australia on / /
and have been resident in Australia since / / ; **and**
 - I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver; **or**
 I was living overseas for the following dates and I understand I do not quality to be paid the Member Tax Credit for this period
 / / to / /
-

continued on following page

Section E: Your statutory declaration (continued)

3. I apply to the Manager of the Scheme to withdraw the balance of my KiwiSaver account and I understand that:
- a withdrawal of my KiwiSaver account balance in the case of permanent emigration is subject to the Manager's approval; and
 - before my application is approved I am required to:
 - complete the statutory declaration contained in this form;
 - provide proof of the date I left New Zealand (e.g., copies of airline tickets, passport other documentation showing departure); and
 - provide evidence of my Australian residential address (e.g., utility bill, bank statement etc.); **and**
4. The value of my withdrawal will be based on the unit price(s) at the date my request is processed and that fees, taxes and expenses may be deducted.
5. I have read and understood the privacy statement set out in Section D and authorise any personal information to be collected, held and disclosed in the manner detailed, including in relation to the overseas disclosure of my personal information, and all information I have provided in this permanent emigration application form is true and correct.

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

Signature
(your signature)

Declared at
(location)

Date / /

Before me (JP, Solicitor, Notary Public or other person authorised to take a statutory declaration, such as the Registrar or Deputy Registrar of the High Court or of any District Court or a member of parliament):

Full name Occupation

Signature Declaration taker's details/stamp

Section F: Consent and signature

- I understand that any information I give to the Manager may be passed on to my chosen Australian superannuation scheme as reasonably required and I authorise the Manager to give such information in relation to this transfer as is requested by my chosen Australian superannuation scheme.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian superannuation scheme, and that I am liable for any such tax consequences.
- I acknowledge that the Manager 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 my Aon KiwiSaver Scheme account will be closed upon my Aon KiwiSaver Scheme savings being transferred to my chosen Australian superannuation scheme.
- I understand that following a transfer of my KiwiSaver savings to an Australian superannuation scheme I will not be able to transfer them to a third county.

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Section F: Consent and signature (continued)

- I understand that my application is subject to the Manager’s approval and that the Manager may request additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation scheme named in section B of this application cannot accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian superannuation scheme, the Manager, the Supervisor and the administrator of the Aon KiwiSaver Scheme will be released from all liabilities in respect of my membership in the Aon KiwiSaver Scheme.
- I understand that the “New Zealand sourced” savings in my Australian superannuation scheme will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (currently 65).
- I understand that once my Aon KiwiSaver Scheme savings have been transferred to Australia, they will become (with a few exceptions) subject to the standard rules and regulations governing the Australian superannuation scheme.
- I understand the Australian superannuation scheme may require additional information from me before my application is processed.

Signature

Date / /

Checklist

I have:

- completed all sections of this form
- signed and dated Sections E and F
- had Section E duly completed in the presence of a person authorised to take a statutory declaration.

I attach:

- proof of the date I left New Zealand and emigrated to Australia (e.g., copies of airline tickets, passport other documentation showing departure)
- evidence of my Australian residential address (e.g., utility bill, bank statement etc.)
- a letter from my superannuation provider, confirming that they are willing to accept the transfer, their bank account details, and if your funds include UK Pension transfers that they are a QROPS registered scheme (as detailed in Section C)
- a completed AML identity verification form

Please return the completed form and documentation to:

Freepost Aon Retirement Saving

Aon KiwiSaver Scheme, P O Box 332, Shortland St, Auckland 1140.

If you have any questions about completing this form, please call 0800 AON INFO (0800 266 463).