

# KiwiSaver Transfer Request Form



## Transferring savings from your superannuation account fund to a KiwiSaver scheme

To transfer funds from your superannuation account to a KiwiSaver scheme, you must:

- have permanently emigrated to New Zealand - you need to sign a statutory declaration stating this is the case, and provide proof of residence at an address in New Zealand
- contact the Fund and request the whole balance of your super savings be transferred to a KiwiSaver scheme
- have a KiwiSaver scheme ready to receive the transferred funds and ensured the KiwiSaver scheme is going to accept your Australian transfer.

## Section 1: Your details

Surname:  Salutation:

Given name(s):  Date of birth:

Postal address:

Suburb:  State:  Postcode:

Telephone (BH):  (AH):  Mobile:

Email:  Membership number:

Tax file number:  It is not compulsory to provide your TFN. However, if you do not provide your TFN, we may have to deduct a higher tax rate from your account when your benefit payment is made.

If an employer contributed to this account, advise the date you ceased employment with that employer:

## Section 2: Transfer to KiwiSaver scheme

**KiwiSaver Scheme Details**

KiwiSaver scheme name:

KiwiSaver address:  KiwiSaver phone number:

KiwiSaver registration number:  KiwiSaver member number:

## Section 3: Declaration

By signing this form, I acknowledge that:

- I have read the Privacy Collection Statement and I understand how the Fund will use my personal information.
- I may ask the Fund for information about any fees or charges that may apply, or any other information that may affect my super, and have obtained or do not require this information.
- My account will close and any Death, Total & Permanent Disablement and Income Protection cover will end. The Fund will no longer have any responsibility for the account.
- I consent to the transfer of my entire super balance from the Fund to my KiwiSaver Scheme.
- I have permanently emigrated to New Zealand.
- My KiwiSaver provider can accept this transfer.

Member signature:  Date:

## Section 4: Identity verification

To make payments to you from your account we must verify your identity; you can supply us with an original certified copy of your photographic identification document via post, or you can submit with this form a scanned non-certified colour copy of your photographic identification.

If you supply us with a scanned copy of your identification we also need to electronically verify your identity. If you do not want us to identify you electronically please supply us with original certified copies of your identification via post. If you have any questions around this process please contact us on 1300 264 264.

When you opt for electronic verification, the details of the documents you provide to us will be submitted to the Australian government's Document Verification Service (DVS). The DVS is a national online system that allows organisations to compare an individual's identifying information with a government record. Information about their privacy policy is available from their website: <http://www.dvs.gov.au>.

If you would like to proceed with electronic verification please tick each of the consent boxes below:

- You consent to us electronically verifying your identity; AND
- You are authorised to provide the identification documents to us; AND
- You understand that the details of the identification documents will be checked against the Australian government's document verification service.

Please note that we are unable to make any payment until your identity has been verified either by this method, or by receiving a certified original copy of your identification by post.

## Section 5: Statutory declaration

### New Zealand Statutory Declaration - Oaths and Declarations Act 1957

I [insert your name, address and occupation below]

Full name:

Current New Zealand street address (no PO Boxes):

Town/city:  Country:  Postcode:

Occupation:

make the following declaration under the *Oaths and Declarations Act 1957*:

1. I have permanently emigrated to New Zealand.
2. All supporting documents provided with this application are true and correct.
3. I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.
4. I am aware that if I deliberately provide false information in this Declaration I could be charged with an offence and sentenced in court.

Signature of person making the declaration

Date:

Declared at (place):  on (date):

Before me [insert full name, title and address of person before whom the declaration, or te reo Maori equivalent, is made.]

Full name:

Title (as defined in the Oaths and Declarations Act 1957):

Current New Zealand street address (no PO Boxes):

Town/city:  Country:  Postcode:

Signature of person before whom the declaration is made

Date:

Please return this completed form to Acclaim Wealth PO Box 3528, Tingalpa DC Qld 4173 or email to [info@acclaimwealth.com.au](mailto:info@acclaimwealth.com.au).

Phone: 1300 264 264 Fax: (07) 3899 7299 Website: [www.acclaimwealth.com.au](http://www.acclaimwealth.com.au)

**We are committed to respecting the privacy of the personal information you give us.**

Our formal Privacy Statement sets out how we do this. If you would like a copy of Acclaim Wealth's Privacy Statement, please let us know. We have published our Privacy Statement on our website at [www.acclaimwealth.com.au](http://www.acclaimwealth.com.au).