

# Retirement Withdrawal Form

## About this form

This form is for applying for a retirement withdrawal or to set-up a regular withdrawal from your Pie KiwiSaver Scheme account. For help completing this form, phone **0800 586 657**. Once complete, please email an electronic copy to **withdrawals@piefunds.co.nz** or post the completed form to: **Pie KiwiSaver Scheme, PO BOX 33 1079, Takapuna, Auckland 0622**.

You can withdraw part or all of your retirement savings or set up a regular withdrawal on or after you turn 65. However, if you joined KiwiSaver (or a complying superannuation fund) prior to 1 July 2019 and were aged 60-64 at the time, you may miss out on future government and compulsory employer contributions by withdrawing before you have been a KiwiSaver member for five years.

You do not have to withdraw all or any of your KiwiSaver savings immediately when you retire and there are many options (see Section 2) to help you with your retirement objectives. If you choose to do nothing, your savings will continue to be invested as they are currently. You can also continue to contribute to your account if you wish.

## Access to Australian Sourced Savings

If you have transferred funds from an Australian complying superannuation scheme, you can withdraw your Australian sourced savings from your Pie KiwiSaver Scheme account when you meet the following criteria:

- You are aged 60 years or over; and
- You have retired from being gainfully employed and you do not intend to be gainfully employed in future, on a full-time or part-time basis.

Please note, it can take up to 15 working days for the application to be reviewed and processed.

## Checklist

Please complete the checklist below and supply the relevant documents to support your request.

- |  |   |
|--|---|
| <input type="checkbox"/> <b>Sections 1-3:</b> Complete                   | <input type="checkbox"/> <b>Section 7:</b> Confirm your New Zealand residency                       |
| <input type="checkbox"/> <b>Section 4:</b> Provide proof of identity     | <input type="checkbox"/> <b>Section 8:</b> Read the privacy statement                               |
| <input type="checkbox"/> <b>Section 5:</b> Provide proof of bank account | <input type="checkbox"/> <b>Section 9:</b> Complete the Statutory Declaration in front of a witness |
| <input type="checkbox"/> <b>Section 6:</b> Provide proof of address      |   |

## Section 1: Investor details

Title	First name/s	Last name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	IRD number	Pie KiwiSaver Scheme account number (if known)
<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"/> <input type="text"/>	<input type="text"/>
Email address	Physical address	
<input type="text"/>	<input type="text"/>	
Postal address	City	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home number	Work number	Mobile number
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Section 2: Your KiwiSaver withdrawal options

### Partial withdrawal

Yes      \$

### Regular withdrawal

Yes      Start date

\$        Weekly     Fortnightly     Monthly     Quarterly     Annually

Note: Please note this is the date your withdrawal will be priced, it will be paid 2-5 working days after this date Full withdrawal

Withdraw my full account balance and close my Pie KiwiSaver Scheme account.

Note: Your final Government Contribution claim will be processed by Inland Revenue before your withdrawal is actioned. This can take up to 10 working days from the date Inland Revenue receives the request.

### Australian Sourced Savings

**Partial withdrawal:** I want to withdraw some of the funds I transferred from an Australian complying superannuation scheme.

Yes      \$

**Full withdrawal:** I want to withdraw all of the funds I transferred from an Australian complying superannuation scheme.

Yes

## Section 3: Payment details

We will only make payments in New Zealand dollars to a New Zealand bank account in your name (held individually or jointly). We will adjust your withdrawal amount for any tax liability.

Account name       Name of bank   
Account number   
Branch address       City       Postcode

## Section 4: Proof of identity

One of the following:

- Passport (pages containing name, date of birth, photograph and signature)
- New Zealand driver licence (*front and back*) plus bank statement
- Name change documentation (if applicable)

OR

Full birth certificate, **plus one** of the following:

- Overseas driver licence (*front and back*)
- 18+ Card

### Examples



\* If you have changed your name since opening a Pie KiwiSaver Scheme account, you must supply proof of name change

## Section 5: Proof of bank account

Please provide proof of your bank account name and number by supplying a certified copy of any **ONE** of the following:

- a pre-coded deposit slip
- a copy of a cheque
- a copy of a bank statement
- an over-the-counter printed receipt with a teller's stamp
- an online bank account statement with the name of the bank in the header/footer

*Note: Please ensure the bank account number matches the number you have supplied in Section 3.*

## Section 6: Proof of address

Please provide proof of your physical address (not a PO Box) by sending us a certified copy of an invoice, statement, letter or contract in your name, dated within the last 12 months, from one of the following sources:

- utility providers e.g. water, electricity, gas, telecommunications
- professional service providers e.g. lawyer, accountant
- major service providers e.g. Sky TV, internet provider, newspaper, insurance

## Section 7: Confirmation of New Zealand residency

The first time you request a KiwiSaver retirement withdrawal, you must complete a statutory declaration confirming your principal place of residence was New Zealand for the period of your KiwiSaver membership. Going overseas on a holiday, even for several months is not considered a change of principal residence. However if you lived or worked overseas and received KiwiSaver Government Contributions, we must refund that portion of the credits back to Inland Revenue.

I confirm that for the period that I have been a member of KiwiSaver, my principal place of residence was New Zealand except for the following periods:

From (dd/mm/yy)

To (dd/mm/yy)

From (dd/mm/yy)

To (dd/mm/yy)

From (dd/mm/yy)

To (dd/mm/yy)

My place of residence was New Zealand for the entire period I have been a member of KiwiSaver.

## Section 8: Privacy statement

Any information that you provide may be used by Pie Funds Management Limited (as manager of the Pie KiwiSaver Scheme) and the Supervisor (Trustees Executors Limited) and any of their respective related entities, and by other service providers to the Scheme to provide services in relation to your request. You have the right to access the information held by us and you may also request that it be corrected. If you do not provide your information, we may not be able to process your request.

Our privacy policy is available at [www.piefunds.co.nz](http://www.piefunds.co.nz)

## Section 9: Statutory declaration

A Statutory Declaration is a written statement that allows a person to declare something to be true. This page will need to be completed in front of an authorised person who will witness the declaration.

### Who can witness me making the declaration?

The following people can witness you making the declaration:

- Notary Public
- Justice of the Peace
- New Zealand lawyer
- A person who has legal authority to take statutory declarations in New Zealand.

*Please note that the certifier must be at least 16 years of age and cannot be related to you, your spouse or partner or a person who lives at the same address as you.*

By signing below, I agree/confirm the following:

- Completed Statutory Declaration witnessed by any person, within the last three months, who is authorised to take Statutory Declarations.
- I am a member of the Pie KiwiSaver Scheme.
- I am applying to withdraw or transfer some or all of my KiwiSaver savings from my Pie KiwiSaver Scheme account. I understand that on full payment of my full account balance, I will no longer be a member of KiwiSaver and my KiwiSaver account cannot be reopened. I agree to release all claims that have been made by me on the Manager and/or Supervisor in relation to the Pie 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 Pie KiwiSaver Scheme account.
- The information given in this form, including any attached documents is complete, true and correct. I acknowledge that the Manager (Pie Funds Management Limited) and the Supervisor (Trustees Executors Limited) of the Pie 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 (Pie Funds Management Limited) and/or Supervisor (Trustees Executors Limited) of the Pie 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 understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant including a government agency or reliable, independent source.
- I have read the privacy statement in this form.
- If accessing Australian superannuation scheme funds, and between the ages of 60 and 65, I confirm I have retired from being gainfully employed and I do not intend to be gainfully employed in future, on either a full-time or part-time basis.

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

Signature of applicant

Date

Declared at the following address

Name of witness

Signature of witness

Date