

Section B: Member details (continued)

NZ Funds KiwiSaver Scheme member number

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New Zealand IRD number

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Australian tax file number (if unknown, please visit the Australian Tax Office website on www.ato.gov.au or by phone on +61 6216 1111)

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Section C: Australian superannuation fund details

If you have more than one Australian superannuation fund please complete and sign a separate form for each fund.

Australian superannuation fund name

Name of provider

Account/membership number

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Section D: Authority and acknowledgement

- I have permanently emigrated to New Zealand.
- I authorise NZ Funds (as manager of the NZ Funds KiwiSaver Scheme) to act on my behalf for the purpose of actioning my permanent emigration transfer to the NZ Funds KiwiSaver Scheme and to obtain all information and documentation from the provider of my Australian superannuation fund listed in Section C which is necessary to complete the transfer.
- I authorise the provider of my Australian superannuation fund listed in Section C to release all information regarding me and my superannuation to NZ Funds and to take instructions from NZ Funds in relation to the transfer.
- I authorise NZ Funds to give to the provider of my Australian superannuation fund listed in Section C any information that I give in this form and any other information that my Australian provider requests in relation to the transfer.
- I understand that the transfer is subject to the approval of NZ Funds and the provider of my Australian superannuation fund listed in Section C and that I will be required to complete further documentation in relation to this permanent emigration transfer request.
- I understand that following a permanent emigration transfer of my Australian superannuation funds to the NZ Funds KiwiSaver Scheme I will not be able to transfer them to a third country (being a country other than New Zealand or Australia).
- I understand that any "Australian sourced" balance in my NZ Funds KiwiSaver Scheme account will not be able to be accessed until I reach age 60 and satisfy the definition of retirement as set out in the applicable Australian regulations.
- I understand that if I become eligible to withdraw some of my funds to purchase a home, I will not be able to withdraw the amount transferred from my Australian superannuation fund.
- I understand the permanent emigration transfer of my Australian superannuation fund to the NZ Funds KiwiSaver Scheme will not be considered eligible contributions for the purpose of receiving any member tax credits or first home deposit subsidy.
- I understand that NZ Funds cannot provide any assurance as to when my Australian funds will be transferred to the NZ Funds KiwiSaver Scheme or converted into New Zealand dollars. I understand that NZ Funds will not be liable for any decrease in the value of my retirement savings or change in conversion rate that may occur during the transfer process.
- I understand that once my Australian superannuation funds have been transferred to the NZ Funds KiwiSaver Scheme, they will become, with a few exceptions, subject to the rules and regulations governing the NZ Funds KiwiSaver Scheme.
- I acknowledge that NZ Funds recommends that I seek independent and professional Australian and New Zealand tax advice and financial advice pertaining to my circumstances in relation to the proposed transfer.

Continued over...

Section D: Authority and acknowledgement (continued)

Signature of member

Date

Adviser name

Advisory firm

Important information for members

- Please retain a copy of all superannuation records, including this form.
- In the event that you decide to return to Australia in the future, and take your superannuation savings with you, you will need to provide copies of your superannuation records to your chosen Australian Prudential Regulation Authority (APRA) fund. The APRA fund will need this to establish which amounts have previously been counted towards the non-concessional contributions cap.
- For further information on the contributions caps and Excess Contributions Tax, please visit the Australian Tax Office website: www.ato.gov.au/supercaps