

Transfer to KiwiSaver account

Please complete all pages of this form in black ink, using BLOCK letters.

1. Investor details (must be completed)

member number	<input type="text"/>
member name	<input type="text"/>
date of birth	<input type="text" value="DD"/> <input type="text" value="DD"/> / <input type="text" value="MM"/> <input type="text" value="MM"/> / <input type="text" value="YYYY"/> <input type="text" value="YYYY"/> <input type="text" value="YYYY"/> <input type="text" value="YYYY"/>
permanent address in New Zealand	<input type="text"/>

Please provide a certified copy of proof of residence in New Zealand, refer to section 7 for acceptance documentation.

2. KiwiSaver scheme details (all fields in this section are mandatory)

KiwiSaver scheme name	KiwiSaver registration number	KiwiSaver account number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Fund phone number	Your Inland Revenue Department number (IRD)	
<input type="text"/>	<input type="text"/>	
Fund postal address	<input type="text"/>	

3. Transfer details

If you are updating or providing new bank account details, you will need to provide a copy of your bank statement for verification purposes.

Please note Perpetual will transfer funds in AUD via Telegraphic transfer.

All fields below are required under AML/CTF Act 2006.

Overseas bank details	
overseas bank name	<input type="text"/>
overseas bank address (street name and number)	<input type="text"/>
Swift code	<input type="text"/>
Beneficiary account number	<input type="text"/>
Beneficiary account name	<input type="text"/>
Reference	<input type="text"/>

4. Contribution tax

If you have made personal contributions into your Perpetual WealthFocus Super Plan during the current financial year, please indicate whether you intend to claim a tax deduction. We will deduct 15% contributions tax from the contributions claimed as a tax deduction.

☐

I will not be claiming a tax deduction on these contributions.

☐

I will be claiming a tax deduction on these contributions. Please attach a Section 290-170 Notice to confirm this (available from Member Services 1800 011 022).

5. Applicant signature and authorisation

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

- I request and acknowledge that my whole withdrawal benefit in the Perpetual WealthFocus Super Plan be transferred to my KiwiSaver account
- I have opened a KiwiSaver Scheme account in the KiwiSaver Scheme named in section 2
- my KiwiSaver scheme has confirmed they can accept this transfer
- the information given on this form is correct and complete
- I discharge the trustee of the Perpetual WealthFocus Superannuation Fund of all further liability in respect of the benefits paid and transferred to the KiwiSaver Scheme named in section 2
- I am aware I may ask the trustee of the Perpetual WealthFocus Superannuation Fund for information about any fees or charges that may apply, or any other information about the effect of this transfer may have on my benefits, and do not require any further information
- This instruction will be acted on and effected by the trustee of the Perpetual WealthFocus Superannuation Fund as soon as practicable
- The trustee of the Perpetual WealthFocus Superannuation Fund may utilise the services of any financial institution or foreign exchange service provider, or their agents (the “financial institution”) for the purposes of given effect to your instructions and for the provision of the foreign exchange services
- the rate of currency exchange cannot be guaranteed by the trustee of the Perpetual WealthFocus Superannuation Fund. The trustee of the Perpetual WealthFocus Superannuation Fund does not take any responsibility for currency fluctuations. The rate of currency exchange for the foreign exchange services applicable to any transaction is only secured when the transaction is processed by the financial institution
- I confirm the above terms and conditions have been read and understood and agree to be bound by these.

name

signature

date

6. Statutory declaration

A commonwealth statutory declaration may be made before a person who is able to witness a statutory declaration under the Statutory Declarations Act 1959 and Statutory Declaration Regulations 1993.

If completing this statutory declaration overseas you may have it witnessed at an Australian Consular or by authorised witness as per the Attorney-Generals Department website (www.ag.gov.au) who has a connection with 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.

I (insert your name)	
of (insert current New Zealand address)	
occupation	

Make the following declaration under the Statutory Declarations Act 1959 and Statutory Declaration Regulations 1993:

- I have permanently emigrated from Australia to New Zealand
- my current place of residence in New Zealand is as noted in Section 1
- I have opened a KiwiSaver scheme account listed in section 2
- I request and consent to the payment of the whole of my withdrawal benefit to my account in the KiwiSaver scheme named in section 2
- the KiwiSaver scheme named in section 2 will accept the withdrawal amount to my KiwiSaver scheme account
- I understand the payment will be made in Australian dollars
- I solemnly and sincerely declare that all the information provided in or with this application is true and correct
- this Statutory declaration has been witnessed by a person who is authorised to witness a Commonwealth Statutory Declaration.

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959 and Statutory Declaration Regulations 1993, and I believe that the statements in this declaration are true in every particular.

In addition to the relevant Australian laws, I agree that I make this declaration believing it to be true by virtue of New Zealand's Oaths and Declaration Act 1957 and that I intend to be legally bound under the Act.

Signature of person making this declaration											
	date <table><tr><td>D</td><td>D</td><td>/</td><td>M</td><td>M</td><td>/</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	/	M	M	/	Y	Y	Y	Y
D	D	/	M	M	/	Y	Y	Y	Y		
declared at (place and address)											
before me. (name)											
(address)											
occupation and qualification											
Signature of person before whom the declaration is made											

7. KiwiSaver transfer checklist and where to send your completed form

In order to transfer the balance of your account with Perpetual WealthFocus Super Plan to your KiwiSaver provider all of the following items need to be provided.

A letter from the KiwiSaver scheme

Provide a letter/documentation from the KiwiSaver scheme outlining:

- the scheme is a registered KiwiSaver scheme under the New Zealand KiwiSaver Act 2006
- the scheme is able to accept transfers from APRA regulated funds into its scheme
- provide following details of how the funds are to be paid:
 - overseas bank name
 - bank branch name (i.e. suburb or town)
 - overseas bank address
 - SWIFT Code
 - account number
 - reference (maximum 12 characters).

Note: Funds will only be sent electronically and cannot be done by Bank Draft.

Complete section 3 of this form using the details provided by your KiwiSaver scheme provider.

Proof of residence in New Zealand (section 1)

Provide one **Primary** and one **Secondary** document from the options below.

Primary documents (documents should be no older than 12 months and cannot be expired):

- a certified copy of your passport showing your photo and New Zealand arrival stamp
- a certified copy of your New Zealand Drivers Licence
- a certified copy of a photo identification card issued for New Zealand regulatory purposes (e.g. Aviation/Maritime Security identification, security industry).

Secondary documents (documents should be no older than 12 months and cannot be expired and dated after the date of permanent immigration to New Zealand):

- a certified copy of utility bill addressed to you at your current New Zealand address; (rates notices, council, water, electricity)
- a certified copy of bank statement addressed to you at your current New Zealand address
- a certified copy of New Zealand or Australian Government issued document with the your current New Zealand address
- a certified copy of New Zealand mortgage documents.

Australian Statutory Declaration stating you have permanently emigrated to New Zealand

A full list of authorised persons who can witness the Australian statutory declaration can be obtained from the Australian Attorney-General's Department website www.ag.gov.au/

If you are completing the statutory declaration overseas the witness must:

- fall within one of the categories on the list of authorised witnesses, and
- have a connection to Australia

Generally, if an individual's occupation can be found on the Attorney-General's list of authorised witnesses and they perform that occupation within Australia and its territories they will be considered an authorised witness and may witness a Commonwealth of Australia Statutory Declaration overseas. For example, a member of a police force in Australia has a connection to Australia and therefore may witness a Commonwealth statutory declaration overseas. However, a police officer of a foreign police force does not possess an appropriate connection to Australia and therefore cannot witness a Commonwealth statutory declaration. If you are uncertain whether an individual is an authorised witness please contact us on 1800 025 063 or the Commonwealth of Australia's Attorney-General's Department.

Return this completed form with the required documentation to the following address:

Perpetual WealthFocus Super and Pension
Reply Paid 92151
PO Box 617
Parramatta NSW 2124

Alternatively, you can send us a copy by email:

superandpension@perpetual.com.au