

# KiwiSaver transfer request

Complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate answer boxes with a cross like the following X. Start at the left of each answer space and leave a gap between words.

Please phone us on 1800 023 928 (or +61 3 8306 0977 if outside Australia) with any questions about this form. Fields marked with an asterisk (\*) must be completed.

## Use of this form

This form should only be used by Accumulate Plus members of the fund who have emigrated to live permanently in New Zealand and who wish to transfer their whole Accumulate Plus account balance to a KiwiSaver account that they have established in New Zealand. We recommend you consult a financial or taxation adviser before you withdraw funds. Note: We do not accept incoming transfers from a KiwiSaver scheme.

### Rules for transferring benefits to New Zealand

Once your Australian superannuation benefit has been transferred to your KiwiSaver scheme, it is generally subject to New Zealand's retirement savings rules. However, there are some rules that apply only to money transferred from an Australian super fund to a KiwiSaver scheme, such as it cannot be used to purchase your first home, it cannot be moved to a third country, and it cannot be accessed until you reach age 60 and satisfy the Australian definition of retirement at that age.

If you request to transfer your super to New Zealand and have provided us with all of the required information, we will transfer your super to your KiwiSaver scheme within 30 days. We will send you confirmation of the transaction once the payment is complete.

If you don't have a KiwiSaver scheme you can open one, provided you meet the eligibility requirements. For more information on KiwiSaver schemes, visit [www.kiwisaver.govt.nz](http://www.kiwisaver.govt.nz)

For important information about the transfer of Australian superannuation benefits to a KiwiSaver scheme please go to the Australian Taxation Office website at [ato.gov.au](http://ato.gov.au) and search 'Trans-Tasman retirement savings portability scheme for individuals'.

## Section 1: Member details

\*Accumulate Plus account number

Title:  Mr  Mrs  Miss  Ms Other

\*Full given name(s)  \*Surname

### \*New Zealand residential address – PO Box is **not** acceptable

Unit number  Street number  Street name   
 Suburb  Post code  Country  N  E  W   Z  E  A  L  A  N  D

### Postal address – if different to above

Unit number  Street number  PO Box  Street name   
 Suburb  Post code  Country  N  E  W   Z  E  A  L  A  N  D

### Previous residential address in Australia – PO Box is **not** acceptable

Unit number  Street number  Street name   
 Suburb  Post code  State   
 Date left Australia  dd / mm / yyyy

### \*Your New Zealand IRD number

\*Either Mobile number and/or Daytime phone number Email

▶ By providing your **mobile**, you consent to its use for security validations, e.g. to transact online. By providing your **email**, you consent to receiving communications such as newsletters, significant event notices and other important information to this email, although from time to time we may still need to send you information by post. Note: If no mobile, you **must** give a daytime contact number.



## Section 2: Transfer instructions (partial transfers are not permitted)

I have confirmed that my KiwiSaver scheme will accept transfers from Australian superannuation fund and request that my superannuation benefit be transferred in full from Accumulate Plus to my KiwiSaver account below:

\*KiwiSaver scheme name

\*KiwiSaver registration number

\*Your KiwiSaver Member/account number

\*Postal address of KiwiSaver scheme

Unit number  Street number  Street name   
 Suburb  Post code  Country  **N E W Z E A L A N D**

## Section 3: Documents required checklist

Please provide the following documents **with this form**—we cannot process your transfer request until we have received **all documents**.

- Document 1:** Proof that you reside at an address in New Zealand, e.g. a certified copy of **one** of the following:
- a bank statement addressed to you at your current New Zealand address
  - a utility bill addressed to you at your current New Zealand address
  - a tenancy agreement/property settlement contract in your name relating to your current New Zealand address
  - a pay slip or copy of your employment contract addressed to you at your current New Zealand address.
- If you cannot provide one of the pieces of evidence listed above, you must supply other evidence that proves your current residential address.
- Document 2:** A certified copy of your KiwiSaver statement or another document showing that you have opened a KiwiSaver account
- Document 3:** A signed and witnessed Statutory Declaration stating that you have emigrated to New Zealand and intend to reside there permanently (you can use the attached document for this purpose)
- Document 4:** A certified copy of your ID, unless we have previously received a copy, e.g. a certified copy of **one** of the following:
- Australian state/territory driver's licence containing your photograph
  - Australian passport (a passport that has expired within the preceding 2 years is acceptable)
  - foreign passport or similar travel document containing your photograph and signature
  - foreign driver's licence that contains your photograph and date of birth
  - national ID card issued by a foreign government containing your photograph and signature.

A list of prescribed people who can certify documents is available in a fact sheet on our website [oursuperfund.com.au](http://oursuperfund.com.au)

## Section 4: Declarations and signature

I declare and confirm that:

- All details in this form are true and correct.
- All documents, other evidence or information provided in support of this request are true and correct.
- I consent to the payment of the whole of my Accumulate Plus superannuation benefit to my KiwiSaver account.
- If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this application unless we have already sighted it).
- I understand and consent to my information being collected, disclosed and used in accordance with the fund's privacy policy, which is available by contacting the fund or visiting [oursuperfund.com.au](http://oursuperfund.com.au) (under the 'Privacy' link on the homepage).

Signature

Print name

Date  dd / mm / yyyy

Please send the completed form AND all requested supporting documents to:  
**Commonwealth Bank Group Super:**  
**Mail: GPO Box 4303, Melbourne VIC 3001**



Commonwealth of Australia  
**STATUTORY DECLARATION**  
Statutory Declarations Act 1959

(1) Insert the name,  
address  
and occupation of person  
making the declaration

I, <sup>1</sup>

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make the following declaration under the Statutory Declarations Act 1959:

(2) Set out matter declared  
to in number paragraphs <sup>2</sup>

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 I believe that the statements in this declaration are true in every particular.

(3) Signature of persons  
making the declaration

<sup>3</sup>

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(4) Place  
(5) Day  
(6) Month and year

Declared at <sup>4</sup> \_\_\_\_\_ on <sup>5</sup> \_\_\_\_\_ of <sup>6</sup> \_\_\_\_\_

Before me,

(7) Signature of person  
before whom the  
declaration is made (see  
over page)

<sup>7</sup>

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(8) Full name, qualification  
and address of person  
before whom the  
declaration is made (in  
printed letters)

<sup>8</sup>

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**Note 1** A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years—see section 11 of the Statutory Declarations Act 1959.

**Note 2** Chapter 2 of the Criminal Code applies to all offences against the Statutory Declarations Act 1959—see section 5A of the Statutory Declarations Act 1959.

**A statutory declaration under the Statutory Declarations Act 1959 may be made before:**

(1) a person who is currently licensed or registered under a law to practise in one of the following occupations:

Chiropractor	Dentist	Legal practitioner
Medical practitioner	Nurse	Optometrist
Patent attorney	Pharmacist	Physiotherapist
Psychologist	Trade marks attorney	Veterinary surgeon

(2) a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described); or

(3) a person who is in the following list:

Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public  
Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)

Bailiff

Bank officer with 5 or more continuous years of service

Building society officer with 5 or more years of continuous service

Chief executive officer of a Commonwealth court

Clerk of a court

Commissioner for Affidavits

Commissioner for Declarations

Credit union officer with 5 or more years of continuous service

Employee of the Australian Trade Commission who is:

(a) in a country or place outside Australia; and

(b) authorised under paragraph 3 (d) of the Consular Fees Act 1955; and

(c) exercising his or her function in that place

Employee of the Commonwealth who is:

(a) in a country or place outside Australia; and

(b) authorised under paragraph 3 (c) of the Consular Fees Act 1955; and

(c) exercising his or her function in that place

Fellow of the National Tax Accountants' Association

Finance company officer with 5 or more years of continuous service

Holder of a statutory office not specified in another item in this list

Judge of a court

Justice of the Peace

Magistrate

Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961

Master of a court

Member of Chartered Secretaries Australia

Member of Engineers Australia, other than at the grade of student

Member of the Association of Taxation and Management Accountants

Member of the Australasian Institute of Mining and Metallurgy

Member of the Australian Defence Force who is:

(a) an officer; or

(b) a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 5 or more years of continuous service; or

(c) a warrant officer within the meaning of that Act

Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants

Member of:

(a) the Parliament of the Commonwealth; or

(b) the Parliament of a State; or

(c) a Territory legislature; or

(d) a local government authority of a State or Territory

Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961

Notary public

Permanent employee of the Australian Postal Corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public

Permanent employee of:

(a) the Commonwealth or a Commonwealth authority; or

(b) a State or Territory or a State or Territory authority; or

(c) a local government authority;

with 5 or more years of continuous service who is not specified in another item in this list

Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made

Police officer

Registrar, or Deputy Registrar, of a court

Senior Executive Service employee of:

(a) the Commonwealth or a Commonwealth authority; or

(b) a State or Territory or a State or Territory authority

Sheriff

Sheriff's officer

Teacher employed on a full-time basis at a school or tertiary education institution