

Transfer to a KiwiSaver scheme

Complete this form if wish to transfer the whole of your super benefit to a KiwiSaver scheme.

To transfer your benefit, you must be a permanent resident or citizen of New Zealand and have a KiwiSaver account which will accept your Australian super benefit.



Please read the *Transferring to a KiwiSaver scheme fact sheet* before completing this form.

Checklist

Evidence of your KiwiSaver account

- Have you attached the letter from your KiwiSaver scheme which confirms your KiwiSaver account number and that the provider will accept this payment?

Documents certification

- Have you attached a certified copy of a document (such as a bank statement or utility bill) that states your name and residential address in New Zealand?
- Have you attached a certified copy of your personal identification (such as your passport or driver's licence)?

Statutory Declaration

- Have you completed the Statutory Declaration?
- Has your Statutory Declaration been signed by an eligible witness?

Your application

- Have you completed all the mandatory fields on this form?
- Have you provided your current New Zealand address?
- If you've changed your name, have you provided a certified copy of a name change document?
- Have you signed and dated this form?



All fields marked with * must be completed - otherwise, there may be a delay in processing your request.

Your personal details

| | | | |
|--|--|----------------------|----------------------|
| Member Number* | Title (Mr/Mrs etc) | Surname* | Given names* |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Other/previous names | Date of birth* | | |
| <input type="text"/> | <input type="text"/> / <input type="text"/> / <input type="text"/> | | |
| Current residential address* (see 'Proof of your current address' below) | | | NEW ZEALAND |
| <input type="text"/> | | | |
| Email address | Daytime phone number/Mobile number | | |
| <input type="text"/> | <input type="text"/> | | |

Proof of your current address

To provide proof of your current New Zealand address, please provide a certified photocopy of one of the following documents:

- a bank statement
- a utility bill for basic household amenities (e.g. water, electricity or gas); or
- a letter from a New Zealand government agency (e.g. IRD rates notice).



Your proof of address document must show your name and your current New Zealand address and be dated within the last 12 months.

Transfer instructions

| | | |
|--|--------------------------------|---------------------------|
| Name of KiwiSaver scheme* | KiwiSaver registration number* | KiwiSaver account number* |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Postal address of KiwiSaver scheme* | Phone number | |
| <input type="text"/> | <input type="text"/> | |
| Your Inland Revenue Department (IRD) number* | Email address | |
| <input type="text"/> | <input type="text"/> | |



You must attach a letter from your KiwiSaver scheme confirming your KiwiSaver account number and stating that the provider will accept this payment.

▶ Statutory Declaration (must be completed)

I, (insert your name, address, and occupation)

solemnly and sincerely declare that (tick the declaration that applies):

If you are an Australian who has emigrated to New Zealand

- I have left Australia to live permanently in New Zealand.

If you are a New Zealand citizen who has lived in Australia

- I am a New Zealand citizen who has lived in Australia and worked for an Australian employer.

If you have never lived in Australia but have worked for an Australian employer

- I am a New Zealand resident or citizen.
- I currently reside in New Zealand and intend to continue to permanently or indefinitely reside in New Zealand.
- I do not intend or expect to be employed by an Australian employer or to receive any further superannuation contributions in Australia.
- I have never had the whole of my withdrawal benefit in Maritime Super paid to a KiwiSaver scheme under the *Trans-Tasman Retirement Savings Portability Superannuation Regulations* (Part 12A of the Regulations).
- I do not intend to apply to Maritime Super in the future for the payment of my entire withdrawal benefit in Maritime Super to a KiwiSaver scheme under the *Trans-Tasman Retirement Savings Portability Superannuation Regulations* (Part 12A of the Regulations).

Your signature

Date declared / /

Declared at

BEFORE ME:

Signature of the eligible person witnessing the declaration

Date / /

Full name of the person witnessing

Qualification of witness

Address of witness

▶ Member's declaration

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

- I hereby request and consent to the transfer of my entire Maritime Super benefit and authorise the KiwiSaver scheme to give effect to this transfer
- I declare that the information provided on this form and in the certified copies of documents is true and correct
- I declare that I have opened an account with a Kiwisaver scheme and I have confirmed with them that they will accept the transfer of my benefit from Maritime Super
- I have sufficient information to make an informed decision about the transfer of my benefit from Maritime Super to a KiwiSaver scheme
- I am aware that when I transfer my total benefits from Maritime Super, all insured benefits and insurance cover will cease immediately;
- I release and discharge Maritime Super from all further liability in respect of benefits transferred.

Full Name

Signature 

Date / /



Return your completed form and all supporting documents by post to:

Maritime Super
Locked Bag 2001
QVB Post Office NSW 1230
AUSTRALIA

▶ Transferring to a KiwiSaver scheme

If you are living permanently in New Zealand, the Trans-Tasman portability scheme is designed to facilitate the transfer of retirement savings between Australia and New Zealand so you can consolidate your super in your country of residence.

Who can transfer their super to a KiwiSaver scheme?

You can move your super from a complying Australian super fund to a KiwiSaver scheme if you have an active KiwiSaver account and your provider can accept transfers from Australia, and:

- you are an Australian who permanently emigrates to New Zealand
- you are a New Zealander who has lived in Australia and worked for an Australian employer; or
- you are a New Zealand resident who has worked for an Australian employer.

Rules for transfers to New Zealand

You must transfer your entire withdrawal benefit. Please note that defined benefit and pension accounts cannot be transferred to a KiwiSaver scheme. If you have an Allocated Pension, Working Income Support Pension or Term Allocated Pension, you can convert these into a lump sum to be transferred.

Once you have transferred your super to your KiwiSaver scheme, the funds are subject to New Zealand's retirement savings rules. However, there are some rules that apply to money transferred from an Australian super fund to a KiwiSaver scheme:

- funds cannot be used to purchase your first home
- funds cannot be moved to a third country;
- funds can be accessed when you turn 60 and satisfy the Australian definition of retirement.

How to transfer your super to a KiwiSaver scheme

1 Complete the *Transfer to a KiwiSaver scheme form*

Ensure that you complete all fields marked with an asterisk (*) - there may be delays in processing your transfer if your form is incomplete.

2 Get your supporting documents together

With your application, you'll need to provide:

- certified proof of your New Zealand residence
- written confirmation from your KiwiSaver scheme account that they will accept the transfer
- certified proof of your identity
- a Statutory Declaration.

3 Have your supporting documents certified

Take clear photocopies of your documents and give both the original and the copy to an approved person (see overleaf) to have the copy certified.

The person certifying your documents must compare both documents and state that each copy is a 'true and correct copy of the original' and sign each page.

Providing proof of residence

To provide proof of your New Zealand address, you'll need to provide a certified photocopy of one of the following documents:

- a bank statement
- a utility bill for basic household amenities (e.g. water, electricity or gas); or
- a letter from a New Zealand government agency (e.g. IRD rates notice).

Your proof of address document must be addressed to you at your current New Zealand address and be dated within the last 12 months.

Providing proof of identity

We have stringent verification procedures in place to protect your super, which is why we need to verify your identity before we can transfer your super to a KiwiSaver scheme.

You will need to take a photocopy of one of your identification documents and have it certified. Types of identification documents we can accept include:

- a current Australian or foreign photo driver's licence (both sides)
- a current identity card or Proof of Age card
- an Australian passport (that did not expire more than two years ago); or
- a current foreign passport that shows your photo and signature

How to certify your documents

The person certifying the document must compare the photocopy to the original to ensure that both documents are identical. They must then certify each page as a true copy by writing or stamping 'true and correct copy of the original' followed by their signature, printed name, qualification or occupation and date.

Certifying your documents - if you are living in Australia

Staff in Maritime Super's Sydney and Melbourne offices can certify your documents, as well as our financial planners based in Fremantle and Brisbane.

The following people can also certify your documents:

- a Justice of the Peace
- a Legal Practitioner
- a Medical Practitioner or Nurse
- a Pharmacist, Optometrist or Dentist;
- a Police Officer.

Certifying your documents - if you are living in New Zealand

We can only accept documents that have been certified by:

- an Australian Consular Officer or Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- a Justice of the Peace
- a Registered Medical Doctor
- a Registered Teacher
- a Lawyer
- a Notary Public
- a Chartered Accountant;
- a Kaumatua.

Making a Statutory Declaration

You are required to make a statutory declaration stating that you are a resident or citizen of New Zealand or you have permanently emigrated to New Zealand, which must be witnessed by one of the following people:

If you are making your Statutory Declaration in Australia

The following people can witness your Statutory Declaration in Australia:

- a Justice of the Peace
- a police officer
- a Legal Practitioner
- a Medical Practitioner or Nurse;
- a Pharmacist, Optometrist or Dentist.

For a full list of who can witness your Statutory Declaration in Australia, read the *Providing proof of identity fact sheet* (available from our website or by calling Member Services).

If you are making your Statutory Declaration in New Zealand

The following people can witness your Statutory Declaration in New Zealand:

- an Australian Consular Officer or Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- a Justice of the Peace;
- a Notary Public.

For a full list of who can witness your Statutory Declaration in New Zealand, go to www.legislation.govt.nz/act/public/1957/0088/latest/DLM314584.html

For a full list of types of identification documents we can accept, as well as who can certify your documents, read the *Providing proof of identity fact sheet* (available from our website or by calling Member Services).



Toll Free
1800 757 607
8.30am - 5.30pm AEST



Email
info@maritimesuper.com.au



Website
www.maritimesuper.com.au