

Permanent Emigration Withdrawal Form

Please upload this completed form via the Generate App or email to us.  
If you would like help completing this form, please email [info@generatekiwisaver.co.nz](mailto:info@generatekiwisaver.co.nz) or phone us on 0800 855 322 or +6496005100 (overseas).

Please use this form if you have permanently emigrated from New Zealand and you have lived overseas (except Australia) for at least 12 months. If you have permanently emigrated to Australia you cannot make a withdrawal on the grounds of permanent emigration. However you will be able to transfer all of your KiwiSaver funds to a participating Australian superannuation scheme (subject to a maximum transfer amount). Please contact us to obtain a transfer form.

Once all requirements have been fulfilled and we obtain confirmation from the Inland Revenue regarding Government contributions (allow 10 working days for this process), your withdrawal will be processed within 5 working days. For payments to overseas bank accounts, kindly allow up to 15 days from the date of payment for the funds to clear.

Departure Date

D

D

M

M

Y

Y

Y

Y

You must have been living overseas for at least 12 months.

Document checklist:

- ☐ Provide proof of bank account (refer to page 2)
- ☐ Provide **certified** proof of identity (refer to page 3)
- ☐ Provide proof of overseas residential address (refer to page 3)
- ☐ Provide proof of departure (refer to page 2)
- ☐ Fully completed the Statutory Declaration on page 4 in front of a Notary Public or other person **authorised** to take Statutory Declarations in the country where you reside.

Member Details

Title

First Name

Middle Name

Surname

Date of Birth

D

D

M

M

Y

Y

Y

Y

Residential Address

City

Country

Postcode

Home Phone

Work Phone

Mobile

Email

Generate KiwiSaver Member Number

G

E

N

IRD No.

If you don't know your IRD number, please call the IRD on 0800 227 774 or visit [www.ird.govt.nz/tasks/find-my-ird-number](http://www.ird.govt.nz/tasks/find-my-ird-number)

Where to send this form

**Via the app:** Simply login to your app and upload your completed form and all supporting documentation for processing **or**  
**Email return:** Please scan this completed form and all supporting documentation and email it to us at [info@generatekiwisaver.co.nz](mailto:info@generatekiwisaver.co.nz) **or**  
**Postal return:** Please send this completed form and all supporting documentation to: Generate KiwiSaver Scheme, PO Box 91609, Victoria Street West, Auckland 1142

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## Permanent Emigration Withdrawal Form

### Payment Details

We will only make payments in New Zealand dollars to a bank account in your name (held individually or jointly).  
We will not pay to a business bank account.

Account Holder's Name

Account Number

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
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Bank

Swift Code (if an overseas account)\*

IBAN (if an overseas account)\*

Fees for an international money transfer will apply for funds paid to a bank account outside New Zealand.

### Proof of your Bank Account

New Zealand Bank account in your name

Please provide a bank record or document that:

- includes the bank account name
- includes the bank account number
- includes the bank logo

Examples of this include a bank statement, an online bank account statement, an over the counter printed bank receipt with a tellers stamp, signature and date, a pre-coded deposit slip or copy of a cheque.

\* For a non-New Zealand bank account in your name, we require that your bank record or document be certified. Please refer to page 3 for a list of approved persons. The approved person must write the following on the bank record or document: their name, occupation, signature, date, and the statement,

***"I certify this to be a true copy of the original document".***

### Proof of Departure from New Zealand

Please provide evidence of proof of departure by supplying one of the following:

- Evidence of confirmed travel arrangements
- Copy of passport pages showing departure date stamp
- Evidence of necessary visas
- Immigration New Zealand travel movement report

### Privacy Statement

Generate Investment Management Limited (or Generate group companies), Public Trust, any of their authorised agents, and any distributor (each an "Authorised Person") may collect and hold the personal information that you provide to us as part of this application.

Your information will be used by Generate and the Supervisor to manage your relationship with Generate and the Supervisor, to provide products and services to you, to comply with any applicable laws, to offer you further products and services that may be of interest to you and for any other use for which you have given authorisation. We may also disclose your personal information for these purposes to our staff members, related companies, our third party service providers and to the Financial Markets Authority or other applicable regulators. Generate may further use your information to electronically verify your identity. We may pass your information to and check it with the document issuer, official record holder and authorised third parties that Generate has contracted to carry out the verification process. Generate may share your information and the results of the verification process with appropriate third parties (such as a distributor or adviser that will or has been providing services to you) to enable that third party to comply with any applicable laws.

You may request a copy of the information held about you, and if any of the information is incorrect, ask for it to be corrected. You can do this by contacting us by email or call us on 0800 855 322.

For further information about how we handle your personal information, please read our Privacy Statement available at [generatewealth.co.nz/privacy-statement/](https://generatewealth.co.nz/privacy-statement/).

## Permanent Emigration Withdrawal Form

### Electronic Verification of Identity and Proof of Address (Required for all Signatories)

If you agree to Electronic Verification of Identity please tick the box below. If we are unable to identify you using this method or you do not consent, you will need to provide certified ID and address documents as per the Non-Electronic Verification of Identity and Proof of Address section below.

#### Electronic Verification of Identity and Proof of Address

Generate can confirm the identity and/or New Zealand address of many of our clients electronically, with their permission. Please note that we use an external third party system not owned by Generate to conduct identity checks in this way.

☐ I confirm that I give Generate authority to check my identity and/or address electronically using the documentation provided.

**I have included a copy of my identification – either a current signed Passport or current Driver Licence (front & back) from New Zealand or Australia. Please note, if we are unable to identify you using this method, we will contact you to provide physical documents.**

**Pursuant to Australian legislative requirements Generate must provide you with the following information if you use any Australian identification documents:**

Generate uses identity verification services to verify your identity.

In verifying your information, Generate complies with both the New Zealand Privacy Act 2020 and our Privacy Statement and your rights in relation to your data are included in both the Act and our Privacy Statement at [generatewealth.co.nz/privacy-statement/](http://generatewealth.co.nz/privacy-statement/). Generate's use of identity verification services involves third party systems and services.

If you decline or cannot give your consent to Generate's online identity verification process you may be asked to meet face-to-face with an advisor or alternatively obtain certification of the necessary identification documentation by a trusted referee. This can be a Justice of the Peace, Solicitor or Notary Public.

DVS means Document Verification Service and in Australia it is managed by the Framework Administrator represented by the Australian Attorney General's department. You can get information regarding the operation and management for Australian identity documents at [architecture.digital.gov.au/document-verification-service-dvs](http://architecture.digital.gov.au/document-verification-service-dvs).

Generate's complaints process is available at [generatewealth.co.nz/complaints/](http://generatewealth.co.nz/complaints/).

Generate assumes no responsibility or liability to you for errors in the provision of identity verification services or for any actions taken based on the verification information provided.

### Non-Electronic Verification of Identity and Proof of Address

If you have opted not to use Electronic Verification of Identity, you will need to provide the following documentation to complete your application.

#### CERTIFIED COPY OF IDENTIFICATION

##### OPTION 1

- ☐ Passport; or
- ☐ New Zealand Driver Licence ; or
- ☐ New Zealand Firearms Licence

##### OPTION 2

- ☐ Birth Certificate; or
- ☐ Citizenship Certificate

##### AND one of the following:

- ☐ Kiwi Access Card (18+); or
- ☐ Tertiary Student Photo ID; or
- ☐ Current International Driving Permit and a driver licence from another country

#### CERTIFICATION OF YOUR DOCUMENTS

Provide certified copies of identity documents.

- Certification must be within the last three months.
- Any birth certificates that have been issued before 2003 should be certified or verified.
- The approved person cannot be your spouse, partner, relative or living at the same address as you.
- The approved person could be: a Justice of the Peace, Solicitor, Notary Public, or any other person who has legal authority to take statutory declarations in New Zealand.
- Upon comparing the copy with the original document, the approved person must write on the copy their name, occupation, their signature, the date and the following, **"I certify this to be a true copy of the original document and confirm that it represents the identity of [full name of person being identified]"**

#### PROOF OF ADDRESS

Choose one of the acceptable forms of **proof of address** by sending us a copy of an invoice, statement, letter or contract which shows: The applicant's name, is dated within the last 12 months, shows the full residential address (not a PO Box) and displays the Company logo.

- ☐ Utility provider e.g. water, electricity, gas, telecommunications, Sky TV (or other fixed address media provider)
- ☐ Government or local Government agency e.g. IRD, benefits statement, Council notice
- ☐ New Zealand Bank correspondence
- ☐ Car registration notification/demand
- ☐ Non-Generate KiwiSaver correspondence
- ☐ Insurance company (car, house, contents)
- ☐ Rental tenancy agreement

If you do not have one of the above forms then please provide a copy of an invoice, statement, letter or contract in applicant's name, dated within the **last 3 months**, from one of the following sources:

- ☐ Non-bank, non-KiwiSaver financial institution
- ☐ Insurance company (health, life)

## Permanent Emigration Withdrawal Form

### Statutory Declaration

#### Statutory Declarations made outside of New Zealand

Each country will have its own legislation stating the persons that are authorised to take Statutory Declarations. In general, these persons will include Justices of the Peace, Solicitors and Notaries Public.

Please ensure you check who is authorised to take Statutory Declarations in the country you are residing in.

**Note: What you write must be true. You can be prosecuted if you make a false declaration. If the statutory declaration is not completed in full, you will be required to have the amendment initialled and dated by the same witness.**

**Ensure you include your occupation. If you, the member, are either retired or unemployed please note this in the occupation box. Do not leave any fields blank.**

I (full legal name as seen on ID)

of (full residential address)

Number / Street Name / City / Country

and (occupation (or unemployed/retired))

solemnly and sincerely declare that:

- I am member of the Generate KiwiSaver Scheme.
- I am applying to withdraw or transfer my balance from the Generate KiwiSaver Scheme.
- I understand that any Government contribution amounts will not be paid to me and will instead be repaid to Inland Revenue.
- I confirm that I permanently emigrated from New Zealand at least 12 months ago.
- I agree that by withdrawing from the Generate KiwiSaver Scheme I am ending my membership and all claims that have been made or may be made by me on the Manager and/or the Trustee in relation to the Generate KiwiSaver Scheme.
- I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed and can be affected by market volatility, PIE tax and eligibility to receive government contributions.
- The information given in this form is true and correct. I acknowledge that the Manager and the Trustee of the Generate KiwiSaver Scheme will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against any 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 and/or Trustee of the Generate KiwiSaver Scheme will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.

And I make this solemn declaration conscientiously believing the same to be true by the virtue of the relevant laws of the country this declaration is being made in.

**Note: Do not complete the following section until you are with the person witnessing your declaration.**

Signature (of member)

Declared at (place)

On (date)

#### Before me (person before whom the declaration is made)

Full Name (of person authorised to take declaration)

Occupation (of person authorised to take declaration)

Signature (of person authorised to take declaration)