

1.

Lump Sum Contribution Form

Other Requirements

Please select the most appropriate source of these funds.
Please attach evidence of the source of funds and refer to Page 3 for examples of suitable verification of the source of funds.

- ☐ Compensation payment
- ☐ Divorce settlement
- ☐ Gift
- ☐ Inheritance
- ☐ Lottery/betting win
- ☐ Money from existing Trust
- ☐ Policy claim/maturity
- ☐ Salary/bonus
- ☐ Sale of company
- ☐ Sale of investments
- ☐ Sale of property
- ☐ Savings
- ☐ Other (please provide details below)

Acknowledgement

I understand that this voluntary contribution to my KiwiSaver balance will be:

- invested in the investment option(s) I have selected (if applicable); and
- the contributions will be allocated as soon as practicable after receiving this completed form and required supporting evidence.

Signature

If you have signed electronically, please upload your application via the Generate app, or alternatively provide a valid audit trail if you are emailing the application to us.

Date:

D

D

M

M

Y

Y

Y

Y

Checklist

- I have:
- ☐ Completed all sections of the form
- ☐ Provided supporting documents to evidence source of funds / wealth

You may wish to seek advice from a Generate KiwiSaver adviser in choosing your investment strategy.

The information in this form is being collected for the purposes of effectively managing your investment and it will be held by Generate Investment Management Limited. It may be disclosed to third parties to the extent that it is necessary to administer your application and any withdrawals from the Scheme.

You can ask to see the personal information that Generate holds about you by calling us on 0800 855 322.

Source of Funds

Verification of Source of Funds

The following table shows examples of the documents that we may be able to accept as evidence of the source of your funds.

Source of funds	Verification/Evidence (not exhaustive)
Employment (salaries or wages)	One of the following: <ul style="list-style-type: none">– Pay slip (or bonus) from the last 3 months– Signed Employment contract– IRD personal tax statement– Bank statements for the last 3 months*
Inheritance	One of the following: <ul style="list-style-type: none">– Solicitor’s statement relating to funds– Solicitor’s letter of undertaking– Will AND bank statement evidencing funds deposited*– Probate AND bank statement evidencing funds deposited*– Letter of administration AND bank statement evidencing funds deposited*– Death Certificate AND bank statement evidencing funds deposited*
Insurance payout	Letter from insurer/other party confirming the payout – clearly showing the following: <ul style="list-style-type: none">– the organisation logo– the date and the amount of the payout
Investment maturity	Investment maturity confirmation clearly showing the following: <ul style="list-style-type: none">– the organisation logo– the date matured and amount matured AND: Bank statement evidencing funds deposited*
Sale of property	One of the following: <ul style="list-style-type: none">– Solicitor’s statement relating to funds– Sale and Purchase Agreement signed by all parties AND bank statement evidencing funds deposited*– Solicitors letter of undertaking
Savings	<ul style="list-style-type: none">– Bank statements for the last 3 months showing amount saved*

*All bank statements must clearly show the name of the account and bank logo

Example template for Bank statement

ABCBANK

Mr John Smith
123 Main Street
Sometown
AUCKLAND 1234
New Zealand

Statement of Account

Account No: 22-1234-0123456-00

Statement Date: 01/11/2025

Statement No: 712

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Transaction Summary

Date	Transaction Detail	Withdrawals	Deposits	Balance
	Opening Balance			\$1,582.76
10 September	XYZ Supermarket	\$369.34		\$1,213.42
11 September	Super Petrol Ltd	\$125.00		\$1,088.42
14 September	Power Co	\$135.22		\$953.20
17 September	Active Lawyers		\$10,000.00	\$10,953.20
22 September	Sorting Goods NZ	\$95.99		\$10,857.21
24 September	Pretty Florists	\$58.25		\$10,798.96
	Closing Balance			\$10,798.96