Lump Sum Contribution 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 or phone us on 0800 855 322. Use this form to make a lump sum contribution to your Generate KiwiSaver account. Ν Generate KiwiSaver Member Number **Member Details** Full legal name Date of Birth 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 Residential address City Country Postcode Mobile **Lump Sum Contribution** lintend to deposit I have deposited \$ into the scheme bank account Please invest this voluntary contribution: as per my current investment strategy as per the following combination of funds: CashPlus Focused Growth Conservative Australasian Moderate % Thematic % Balanced % Global % Growth Total (must add to 100%) 100 % AML / CFT Requirements We are required to collect additional information relating to the source and/or wealth of funds under the Anti-Money Laundering and Countering Financing of the content of the content of the content of the Countering Financing FinancTerrorism Act 2009 before we can accept your deposit. What is your current occupation? If you do not work, please state your position, e.g. retired, student, unemployed. Do not leave this field blank. What annual income bracket applies to you? Under \$30,000 \$30,000 - \$40,000 \$40,000 - \$50,000 \$50,000 - \$60,000 \$60,000 - \$70,000 \$70,000 - \$80,000 \$80,000 - \$90,000 \$90,000 or more

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 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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Other Requirements						
Please select the most appropriate source of these fu Please attach evidence of the source of funds and ref	inds. er 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						
Acknowledgement						
I understand that this voluntary contribution to my Kiv	wiSaver 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:						
Checklist						
Thave:						
Completed all sections of the form						
Provided supporting documents to evidence sou	rce of funds / wealth					
You may wish to seek advice from a Generate KiwiSavi	er adviser in choosing vour 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						
$Limited. \ It may be \ disclosed to third parties to the extent that it is necessary to administer your application and any withdrawals from the Scheme.$						

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

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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: - 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: 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: - the organisation logo - the date and the amount of the payout		
Investment maturity	Investment maturity confirmation clearly showing the following: - the organisation logo - the date matured and amount matured AND: Bank statement evidencing funds deposited*		
Sale of property	One of the following: - 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	- 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



Statement of Account

Mr John Smith 123 Main Street Sometown AUCKLAND 1234 New Zealand

 Account No:
 22-1234-0123456-00

 Statement Date:
 01/11/2025

 Statement No:
 712

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 1 of 2

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