

Subsequent Retirement Withdrawal, Amendment and Cancellation Form

You can now complete subsequent retirement withdrawals directly in the Generate app – no form uploads required. If you would like help completing this form, please email info@generatekiwisaver.co.nz or phone us on 0800 855 322.

Please use this form if you have already made a retirement withdrawal from your Generate KiwiSaver Scheme account and would like to apply for a subsequent withdrawal, set-up or amend a regular withdrawal facility or cancel a regular withdrawal facility.

Once we receive your completed application, we aim to pay the withdrawal amount specified by you in the form into your nominated bank account within 5 business days. If any additional information is required, we will be in contact with you.

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

Member Details

Title _____ First Name _____ Middle Name _____

Surname _____ Date of Birth

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Residential Address _____

City _____ Country _____ Postcode _____

Home Phone _____ Work Phone _____

Mobile _____ Email _____

Generate KiwiSaver Member Number

G	E	N							
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 IRD No.

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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

Withdrawal Cancellation

I would like to:

Cancel my regular retirement withdrawal (go to Declaration on page 2)

Your Withdrawal Options

Please pick one of the following withdrawal options:

- Withdraw all of my savings;
- Withdraw part of my savings (minimum withdrawal of \$100);

Amount \$ _____

Set up a regular facility to withdraw my savings (minimum withdrawal of \$100).

Start date of regular withdrawal _____ **Amount \$** _____

Frequency Weekly Fortnightly Monthly Quarterly Yearly

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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Payment Details

Use bank account details on file from the most recent retirement withdrawal

If you would like the payment to be made to a different bank account please complete the details below and provide proof of your bank account name and number, ensuring the bank logo is clearly displayed.

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

Account Holder's Name _____

Account Number

Bank _____ Branch _____

Address/PO Box _____

Town/City _____

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"**.

Declaration

I confirm that the information given in this form is correct. I am a member of the Generate KiwiSaver Scheme and I am applying to the Trustee to withdraw some or all of my KiwiSaver savings from the Generate KiwiSaver Scheme. If I have opted to withdraw all of my KiwiSaver savings, I understand that on payment of my full account balance, I will no longer be a member of KiwiSaver.

Signature (of member) _____ On (date) _____

If you have signed electronically, please upload your application via the Generate app or alternatively if you are emailing the document to us, please use your registered email address