Australian Superannuation Retirement 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 or phone us on 0800 855 322.

Please use this form to apply for a withdrawal of your Australian-sourced funds. This form may only be completed once you have reached age 60.

Once we receive your completed application, which includes all the required supporting documentation, the withdrawal amount specified by you in the form will be paid into your nominated bank account within **10 business days**.

To be eligible, you must:

- ☐ be aged 60 years or over; and
- ☐ have retired from paid employment and do not intend to work more than 10 hours per week in the future

Note: You can choose to withdraw your savings from KiwiSaver at any time once you reach age 65 regardless of your employment status. If you do so you will no longer be eligible for any Government or compulsory employer contributions.

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

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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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 $ _____

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 ☐☐ ☐☐☐☐ ☐☐☐☐☐☐☐ ☐☐☐

Bank _____

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 teller's stamp, signature and date, a pre-coded deposit slip or copy of a cheque.

Note: 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"***.

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/.

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Identification Options

Option 1: 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 documents as per the Non-Electronic Verification of Identity 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/. 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.

Generate's complaints process is available at 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.

Option 2: Non-Electronic Verification of Identity

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	OPTION 2	AND one of the following:
☐ Passport; or	☐ Birth Certificate; or	☐ Kiwi Access Card (18+); or
☐ New Zealand Driver Licence; or	☐ Citizenship Certificate	☐ SuperGold Card (with photograph); or
☐ New Zealand Firearms Licence		☐ Total Mobility Card; 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 12 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 authorised to certify documents 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]"***

An employee or agent of Generate can verify original documents by sighting the original documents and then making the following statement "I verify that the attached documents are true copies of the original documents and that they represent the identity of [full name of the person being identified]"

Additional information: Generate may need to request additional information to process your application. If further information or documents are required, we will contact you using the contact details you have provided.

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Statutory Declaration

A statutory declaration made in New Zealand must be made before a person entitled to witness a statutory declaration under the Oaths and Declarations Act 1957 such as a Justice of the Peace, Solicitor, Notary Public, or a person authorised to take a statutory declaration such as a Registrar or Deputy Registrar of the High Court or any District Court or a member of Parliament.

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 / Suburb / City / Country

and (occupation (or unemployed/retired)) Do not leave blank

solemnly and sincerely declare that:

- I meet the listed requirements in the "Am I eligible" section on page 1.
- The information I have provided in this form is true and correct. I acknowledge that the Manager and the Supervisor 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 Supervisor 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.
- I understand the information supplied by me with this application can be used to electronically verify my identity and address (where necessary) and may be disclosed for these purposes to third parties where relevant including a government agency or reliable, independent source.
- I have read the privacy statement in this form.
- I acknowledge that I am only entitled to withdraw the amount transferred from my Australian Superannuation Provider, disregarding any positive or negative returns since that amount was transferred to my KiwiSaver account.

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

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)