

## 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](mailto:info@generatekiwisaver.co.nz) or phone us on 0800 855 322.**

Please use this form to apply for a retirement withdrawal or set up a regular withdrawal from your KiwiSaver account. This form must be completed no earlier than four weeks from your retirement withdrawal date.

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**. **Please note your payment may be subject to delays if deductions or final payments are to be made by Inland Revenue.**

### Document checklist:

Please complete the checklist below and supply all the relevant supporting documents.

- Completed withdrawal form.
- Provide proof of your bank account (refer to page 2).
- Provide a **certified** copy of identity (refer to table on page 3 for approved identity documents).
- Provide a copy of residential address (refer to table on page 3 for our requirements).
- Confirm your New Zealand residency on page 4 (Statutory Declaration).
- Complete the Statutory Declaration on page 4 in front of a Justice of the Peace, Solicitor, Notary Public or other person **authorised** to take statutory declarations.

### Member Details

Title \_\_\_\_\_ First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Surname \_\_\_\_\_ Date of Birth

Residential Address \_\_\_\_\_

City \_\_\_\_\_ Country \_\_\_\_\_ Postcode \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

Mobile \_\_\_\_\_ Email \_\_\_\_\_

Generate KiwiSaver Member Number

IRD No.

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

### Where do I send my application to?

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



## Retirement 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)

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]"

## Retirement Withdrawal Form

### 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 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 / City / Country

and (occupation (or unemployed/retired))

solemnly and sincerely declare that:

- I am a member of the Generate KiwiSaver Scheme.
- I am applying to withdraw or transfer some or all of my KiwiSaver savings from my Generate KiwiSaver Scheme account. I understand that on full payment of my full account balance, I will no longer be a member of KiwiSaver. I agree to release all claims that have been made by me on the Manager and/or Trustee in relation to the Generate KiwiSaver Scheme.
- I understand that any annual Government contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to the Commissioner of Inland Revenue.
- I understand that my withdrawal value will or might fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my Generate KiwiSaver Scheme account.
- 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.
- I have read the privacy statement in this form.

#### During the time I have been a member of KiwiSaver, I (tick one):

- Have had my principal place of residence in New Zealand for the entire time (continue to signature section).
- Was living overseas for the following period(s):

From (insert dates) 

D	D	M	M	Y	Y	Y	Y
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 to 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

From (insert dates) 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

 to 

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

And I make this solemn declaration conscientiously believing the same to be true and by the 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)