



Australian Superannuation Retirement Withdrawal

Australian Superannuation Retirement Withdrawal Criteria

You can withdraw your Australian Superannuation funds from your KiwiSaver account when you meet the following criteria:

- You have reached the age of 60; and
- You have retired at the date of the withdrawal request.

For the purposes of assessing your eligibility to withdraw your Australian superannuation funds, retirement is defined in Australian regulations as a person who has reached the age of 60 and intends to never again become gainfully employed, either on a full time or part time basis.

This withdrawal application will be processed once all requirements have been received and you have reached the age of 60. You can withdraw the remaining funds in your KiwiSaver account once you've reached the age of 65.

Confirmation of retirement

When you first ask for an Australian retirement benefit, you are required to give a statutory declaration in confirming that you are retired and do not intend to be gainfully employed again on either a full time or part time basis. This is an Australian legislative requirement.

Privacy Statement

The personal information we collect from you in this application form and subsequently, if necessary, is covered by the Privacy Act 2020, and may be used by our team, the Supervisor and any of their respective related entities, and by other service providers to provide services in relation to your withdrawal request. You have the right to access the information held by us and you may also request that it be corrected. Our privacy policy, which is available on our website at www.pathfinder.kiwi/privacy-policy/, have more details of how we could collect and use your personal information.

Document Checklist:

Please send us all applicable documents listed below for fast handling of your application.

- Completed Application Form (pages 2-4), including the Statutory Declaration
- Proof of bank account e.g. bank statement
- Certified copy of identity following our guidelines
- Certified proof of address following our guidelines





Australian Superannuation Retirement Withdrawal

You must complete this form including the checklist before accessing your Australian Superannuation balance. Please contact our customer service team at apply@pathfinder.kiwi or 0800 (ETHICAL) 384 4225, if you need any specific assistance.

Your details

Title _____ First Name _____ Middle Names _____
 Last Name _____ Date of Birth _____
 Postal Address _____
 Town/City _____ Country _____ Postcode _____
 Home phone _____ Mobile _____
 Email _____ IRD Number
 Prescribed Investor Rate (PIR) 10.5% 17.5% 28%

Payment details

I wish to withdraw my Australian Superannuation: (please tick one)

Amount: \$ _____ OR my full Australian Superannuation Balance

Lump sum payments

Complete this section if you want to take out one or more lump sum payments. Show both the amount required and the date to be paid. This can be as well as, or as an alternative to, the regular withdrawals below.

Amount	Date
\$	
\$	
\$	
\$	
\$	
\$	
\$	





Regular withdrawals

Complete this section if you want to receive a regular withdrawal of your Australian Superannuation.

I want to receive a regular payment of \$ _____ to be processed:

Frequency Weekly Fortnightly Monthly Quarterly 6-Monthly Annually

I want the regular payments to start on _____

Please allow at least 10 business days for funds to be processed and paid to your nominated bank account.

Please pay my benefits to:

Account Name _____ Bank Name _____

Branch Name _____ Account Number _____

Bank Branch Account Number Suffix

Please provide a deposit slip or other evidence verifying the above bank account name and number.

Signature

Please note: These regular withdrawals will cease once the entirety of your Australian Superannuation has been withdrawn from your KiwiSaver account. Once you reach age 65 you can withdraw the remaining portion of your KiwiSaver balance using our Retirement Withdrawal form.

I understand payment may take up to **ten** business days to be processed.

Signature _____ Date _____

Disclaimer: By typing your name above you are signing this application electronically. You agree that your electronic signature is the legal equivalent of your manual signature and confirm the information stated on this form is correct.



Statutory declaration

Please complete this section before an authorised witness¹.

If you have previously made a partial withdrawal and completed this section, you do not need to complete it again.

I (enter your full legal name) _____

occupation (enter your occupation - or unemployed/retired) _____

Of (enter the full residential address where you live) _____

solemnly and sincerely declare, that 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 Declarant _____

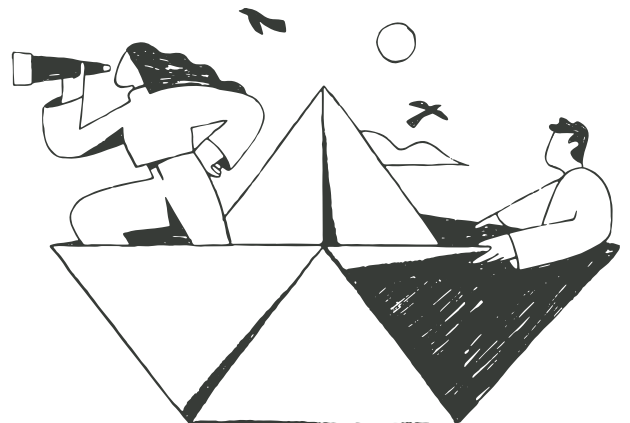
Declared at (place, for example, town or city) _____ Date _____

Before me (details of authorised witness¹)

Name _____ Occupation _____

Address _____ Signature _____

¹A Justice of the Peace for New Zealand or other person (e.g. notary public, solicitor, officer of the court) authorised to take and receive Statutory Declarations.





Certification guidelines

- **Acceptable Documents**
 - current passport (including your photo and signature pages) or Drivers Licence (back and front). If these are foreign documents they need to be translated into English.
 - utility bill, bank statement or letter from Government Department issued within the last 3 months showing your address.
- Certification must be within the last six months.
- The certifier must be: a JP; Chartered Accountant; Lawyer; Police Officer; Registered Teacher; Registered Doctor or any other person who has legal authority to take statutory declarations. The certifier cannot be your spouse, partner, relative or living at the same address as you.
- Upon comparing the copy with the original document, the certifier 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]."

Where do I send my application to?

Email return:

Please scan this application and email it to us at apply@pathfinder.kiwi or

Postal return:

Please send this application to: Pathfinder Asset Management, PO Box 2673, Auckland 1140.

If you have any questions, please contact 0800 ETHICAL (384 4225).

Please allow three business days for this application to be processed.

