

SERIOUS ILLNESS WITHDRAWAL APPLICATION FORM

You can email this form and all required supporting documents to earlywithdrawals@anzinvestments.co.nz. Alternatively, you can take them to any **ANZ branch**, or post them to **ANZ Investments, Freepost 324, PO Box 7149, Wellesley Street, Auckland 1141**.

1. YOUR INFORMATION

First name(s)

Surname

ANZ customer (or investor) number

Date of birth

Country of birth

Contact number Email

IRD number

Prescribed investor rate 10.5% 17.5% 28% (see anz.co.nz/pirupdate for help)

2. WITHDRAWAL DETAILS

We can only pay your withdrawal amount to you; we can't pay third parties.

If my application is approved:

Please pay my withdrawal amount into my New Zealand bank account detailed below:

	Bank	Branch	Account number	Suffix
Payment account	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of bank account holder <input type="text"/>				

3. IDENTIFICATION

As part of your application, you must provide certified copies of your ID and proof of address. An ANZ staff member or an ANZ Investments approved financial adviser can verify these documents. Alternatively a Notary Public, Justice of the Peace, NZ lawyer, or other person who has legal authority can certify these documents before sending them to us. See anz.co.nz/myid for more information.

If we need to ask you for further information, this will delay the processing of your application.

Identity documents

Please provide us with:

Option 1: ONE of these documents:

- New Zealand passport National ID card
 Overseas passport (signed) New Zealand firearms licence

Option 2: A New Zealand driver licence AND

ONE of these documents (must be dated within the last six months):

- Non-ANZ Bank statement Government Agency document (issued to you)
 SuperGold Card New Zealand Defence or Police Photo ID

Option 3: ONE form of primary non-photo ID

- New Zealand full birth certificate Certificate of New Zealand citizenship
 Overseas birth certificate Overseas citizenship certificate

AND

ONE form of secondary photo ID

- New Zealand driver licence New Zealand Defence or Police Photo ID
 International Driving Permit 18+ card or Kiwi Access Card



I, James Black

hereby certify that this is a true and correct copy of the original document which I have sighted, and it represents a true likeness of the individual.

Dated the 15th day of January 2016

Enrolled barrister and solicitor of the High Court of New Zealand

Here is an example of what your ID should look like when it's been certified correctly. Ensure the 'true likeness' wording is included.

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3. IDENTIFICATION (CONTINUED)

Proof of address

Please provide us with **ONE** of the below acceptable forms of address. The document must be dated within the last six months, addressed to you, and show your residential address.

- | | | |
|--|---|---|
| <input type="checkbox"/> Utility bill | <input type="checkbox"/> Non-ANZ Bank insurance document | <input type="checkbox"/> Letter from an Education Institution
(Primary/Secondary school letters must be signed by the principal) |
| <input type="checkbox"/> Non-ANZ Bank statement | <input type="checkbox"/> Car registration notification/demand | |
| <input type="checkbox"/> Government agency document | <input type="checkbox"/> Electoral roll papers | |
| <input type="checkbox"/> Signed rental tenancy agreement | <input type="checkbox"/> Electronic White/Yellow Pages | |

4. CHECKLIST

Make sure you send us everything listed below, as we can't consider your request without the following:

- Your completed application.
- Your completed statutory declaration signed by you, and witnessed by a person authorised to take statutory declarations.
- Certified or verified evidence of your identity (if applicable, see section 3 of this form).
- Certified or verified evidence of your residential address (if applicable, see section 3 of this form).
- Your medical declaration signed by your medical practitioner (see section 6 of this form).

5. WHAT TO EXPECT NEXT

- Once you've submitted your withdrawal application, you'll receive a text/email confirming it's been received and that we're checking all documents have been provided.
- If we require any additional information or documents we'll contact you using the mobile, email and/or postal address you have provided us.
- Once we have all the documents required we'll begin processing your application.
- If your application is approved we will send you a text/email with a confirmation.
- We aim to pay your withdrawal and show it in your KiwiSaver account in ANZ Internet Banking and goMoney within 15 business days if you give us all the information we need. If we have to ask for more information, this may cause delays in the processing of your withdrawal.
- The payment should be available in your account within three business days of the approval.

ANZ branch staff can't take statutory declarations. A solicitor, Justice of the Peace or Registrar of a New Zealand Court can take this statutory declaration for you. For more information about who can take statutory declarations, see anz.co.nz/myid.

1. ELIGIBILITY FOR GOVERNMENT CONTRIBUTIONS

To be eligible to withdraw Government contributions you have received during your KiwiSaver membership, you must have had your principal place of residence in New Zealand over that time. Please complete the following question to assess your eligibility:

During your KiwiSaver membership, were there any periods when you lived overseas and did not have a permanent residence in New Zealand?

No (continue to section 2) **Yes.** List below the periods when you lived overseas and did not have a permanent residence in New Zealand:

I lived in from to

I lived in from to

Please note that if you were working overseas as an employee of the New Zealand Government or as a volunteer for certain charitable organisations, you are eligible for Government contributions. If this applies please provide evidence with your application, such as a letter on your employer's letterhead confirming the period you were employed.

Call 0800 736 034 (+64 9 356 4000 if overseas) or email service@anzinvestments.co.nz if you have any questions.

2. STATUTORY DECLARATION

I (Full name of the person making the declaration)
of Residential address
 Postcode
and Occupation

do solemnly and sincerely declare that:

I understand that

- if I have not had a principal place of residence in New Zealand during my KiwiSaver membership, I will not be entitled to withdraw any Government contributions received during that same period. Any Government contributions claimed on my behalf during any such period will be returned to Inland Revenue. The information I have provided in section 1 above is correct to the best of my knowledge.
- if I withdraw my full balance, my KiwiSaver account will be closed, and I will no longer be a member of KiwiSaver.
- if I have funds transferred from an Australian complying superannuation fund, and I am paid a partial withdrawal, the withdrawal must be applied to my KiwiSaver funds first.
- ANZ Investments and/or the supervisor may contact the medical practitioner providing the medical certificate on page 3 to gain clarity of my condition if required. I consent to that medical practitioner providing my personal information to ANZ Investments and/or the supervisor for that purpose.
- my funds continue to be invested, and may rise or fall in value, until the withdrawal is approved and payment is completed.

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 the person **making** the declaration (the applicant)

Declared at (location)

this

day of

20

Before me: (signature, name, occupation and address of the person in front of whom the declaration is made)

Full name

Address

Postcode

Occupation

Signature of the person **taking** the declaration

STATUTORY DECLARATION

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INTERNAL USE - ANZ STAFF ONLY

I (staff full name)

hereby verify that this is the original document.

Date

Signature

Staff job role

Branch name

Branch Stamp

Once completed – staff must scan this form and all required supporting documents in the checklist to earlywithdrawals@anzinvestments.co.nz