Westpac KiwiSaver Scheme
Court Order Withdrawal application

How do I qualify?

To be eligible for this type of withdrawal, you must have a court order instruction that you can make an early withdrawal from KiwiSaver.

What can I withdraw?

If approved, your payment will be the court ordered payment amount. This is dependent on your KiwiSaver balance.

When can I expect payment?

Generally, once we've received your completed application form and all supporting documentation, your payment will be made within 10 business days of your request being approved. We'll let you know the outcome of your withdrawal request.

Need help?

If you need help completing this form or would like an update on your application, call **0508 972 254** (**+64 9 375 9978** from overseas) weekdays between 8.30am and 5pm. Alternatively, email us at **kiwisaverhelp@westpac.co.nz**

How do I apply?

1. Complete all sections of this form.
2. Review 'Your checklist' to ensure you have everything you need.
3. Once completed, your solicitor must send us your form and supporting documents:

Westpac KiwiSaver Scheme
PO Box 934
Auckland 1140

Westpac KiwiSaver Scheme
Westpac on Takutai Square
53 Galway Street
Auckland 1010

Any Westpac branch

Privacy statement

The personal information which you provide in (or in connection with) this form will be held securely by BT Funds Management (NZ) Limited (Manager) and/or The New Zealand Guardian Trust Company Limited (Supervisor), at the address of the Manager, and may be disclosed to Westpac Banking Corporation ABN 33 007 457 141 (Westpac), Westpac New Zealand Limited (Westpac NZ) and any other entity that is involved in the administration and management of the Westpac KiwiSaver Scheme (including Inland Revenue and any regulatory body). You have the right to access and correct this information subject to the provisions of the Privacy Act 2020. Your personal information may otherwise be collected, used and disclosed in accordance with Westpac's Privacy Policy (available at **westpac.co.nz/privacy**). You agree that the Manager may approach the solicitor who submits this application to provide further information as reasonably required.

Your checklist

Please ensure that you provide us with all the following:

- ◯ Your fully completed application form.
- ◯ Certified copy of the court order.
- ◯ Check your statutory declaration has been completed, signed and witnessed by a person authorised to take statutory declarations.
- ◯ A certified copy or original bank statement/deposit slip if the bank account for payment is not a Westpac New Zealand bank account.
- ◯ Certified copy of acceptable identity documentation (such as the photo and signature pages of your current signed passport, or both sides of your current New Zealand driver licence).
- ◯ Certified copy of proof of address showing your name (such as a recent rates, power or phone bill). This can't be from Westpac and must be dated within 12 months of your application.

Documents must be received by Westpac within 3 months of being certified. For a full list of acceptable identification and proof of address, go to **westpac.co.nz/AML**

What's a certified copy?

A certified copy is a copy of an original document on which an authorised person (such as a Justice of the Peace, solicitor or other legally authorised person) has confirmed it is a true copy of the original. All certified copies must include:

- The certifier's name, occupation, signature and date.
- The following or equivalent wording: "I certify this to be a true copy of the original document as sighted by me on [date]"
- For identity documents only, add: "and it represents the true likeness and identity of the individual" (or words to that effect)

The certifier can't be someone you're related to, your spouse/partner, or someone who lives at the same address.

Westpac branch use – branch checklist Branch name _____ Staff name _____

◯ Form is complete ◯ Customer is AML compliant, current ID and proof of address has been verified/certified and loaded into Sales Customer (Assist)

Your details

We'll update your address and PIR details if they differ from our records. We won't update your phone and/or email details unless we have none on file or you tick the box below:

◯ **Update my details:** Update my phone number and/or email details so all future Westpac KiwiSaver Scheme and general Westpac correspondence goes to the below:

◯ Mr ◯ Mrs ◯ Miss ◯ Ms ◯ Other (please specify) _____ Date of birth DD / MM / YYYY

Name FIRST MIDDLE LAST

Physical address NUMBER & STREET SUBURB TOWN/CITY POSTCODE

Postal address (if different) NUMBER & STREET SUBURB TOWN/CITY POSTCODE

Phone HOME MOBILE

Email

IRD number | | | | | | | | | |

Westpac KiwiSaver Scheme member number | K | S | | | | | | | | Find it in online banking or on your statement.

Prescribed Investor Rate (PIR) ◯ 10.5% ◯ 17.5% ◯ 28%. Find yours at **ird.govt.nz/pir**

Statutory declaration

Eligibility to withdraw government contributions

For any period(s) during your KiwiSaver membership when New Zealand was not your principal place of residence, any government contributions claimed on your behalf will be deducted from your withdrawal amount and returned to Inland Revenue.*

During your KiwiSaver membership, were there any periods when you lived overseas and did not have your principal place of residence in New Zealand? (Please tick only one.)

◯ No (Continue to the 'Your statutory declaration' section below.)

◯ Yes (Please list below, excluding any overseas holidays where you remained a New Zealand resident. Then continue to the 'Your statutory declaration' below.

I lived in _____ from Date DD / MM / YYYY to Date DD / MM / YYYY

I lived in _____ from Date DD / MM / YYYY to Date DD / MM / YYYY

I lived in _____ from Date DD / MM / YYYY to Date DD / MM / YYYY

*If you were working overseas as a government employee or as a charity volunteer, you may still be eligible for government contributions. Please provide evidence with your application, such as a letter from your employer confirming the period you were employed.

Your statutory declaration

It must be completed and signed in front of a Justice of the Peace, a solicitor, or other person authorised to witness a statutory declaration. Westpac staff cannot witness this statutory declaration.

I NAME OCCUPATION

of ADDRESS

Solemnly and sincerely declare that:

- I have read and understood the Privacy Statement.
- All the information provided in this form (and any included materials) is true and complete.
- I understand that if the information in my application is incomplete or incorrect, the Manager of the Westpac KiwiSaver Scheme will not be able to complete its assessment of my application.
- I have met the eligibility criteria listed in the 'How do I qualify?' section.
- I have permanently resided in New Zealand for the full duration of my KiwiSaver membership, other than the periods (if any) listed in the 'Eligibility to withdraw government contributions' section.
- I understand that my withdrawal value will be based on the unit price(s) applying at the date that my withdrawal request is processed, so may be subject to change. It can be affected by market volatility, PIE tax rebates or deductions, additional contributions received and eligibility to receive government contributions.
- I understand that if I am invested in more than one fund, the withdrawal will be deducted proportionately across each of the funds I am invested in, unless I have instructed differently.

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

PLEASE PRINT THIS FORM AND SIGN THE STATUTORY DECLARATION IN FRONT OF YOUR WITNESS.

My signature Declared at TOWN/CITY Date DD / MM / YYYY

Before me (Justice of the Peace, solicitor, Notary Public or other person authorised to take a statutory declaration in accordance with the Oaths and Declarations Act 1957):

Signature of witness

Name of witness

Declared at TOWN/CITY Occupation Date DD / MM / YYYY

STAMP