

Westpac KiwiSaver Scheme Deceased Estate Withdrawal Application



How do I qualify?

To be eligible for this withdrawal, you must be:

☐ Where the Deceased's KiwiSaver account value is equal to or less than \$40,000:

The **Claimant** who's entitled to make a claim under section 65 of the Administration Act 1969, where the deceased member's account value is equal to or less than \$40,000 (Probate/Letters of Administration are not required). Please tick only one to show your relationship with the deceased:

- ☐ Wife, husband, civil union partner or defacto partner.
- ☐ Child.
- ☐ Person beneficially entitled to the estate in the Will or on intestacy.
- ☐ Person entitled to obtain administration of the estate in New Zealand.
- ☐ Person related by blood, marriage or civil union to the deceased who undertakes to maintain the children (who are minors) of that person.
- ☐ Person who has custody and control of the children of the deceased (who are minors).

☐ Where the Deceased's KiwiSaver account value is more than \$40,000:

The deceased member's **Personal Representative(s)** where the deceased member's account value is more than \$40,000. Please tick only one:

- ☐ Where the deceased member left a Will, this is the person(s) who has been granted probate.
- ☐ Where the deceased member did not leave a Will, this is the person(s) who has been granted 'Letters of Administration'.

What can I withdraw?

If approved, you'll be transferring the full available balance of the deceased member's Westpac KiwiSaver Scheme account.

When can I expect payment?

Generally, once your completed application form and all supporting documents have been received, your payment will be made to your nominated bank account within 10 business days of your request being approved. We'll let the primary Claimant/Personal Representative 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 NZ time. Alternatively, email us at kiwisaverhelp@westpac.co.nz

How do I apply?

1. Primary Claimant/Personal Representative to complete all sections of the form.
2. Then send the form and supporting documents to:
Courier: Westpac KiwiSaver Scheme, Westpac on Takutai Square, 53 Galway Street, Auckland 1010, New Zealand
Post: Westpac KiwiSaver Scheme, PO Box 934, Auckland 1140
Visit: any Westpac branch

Your checklist

If the withdrawal amount is equal to or less than \$40,000, you'll need:

- ☐ Fully completed application form by the primary Claimant under section 65 of the Administration Act 1969 (see 'How do I qualify?').
- ☐ Check the primary Claimant has completed and signed the statutory declaration, and it has been witnessed and signed by a person authorised to take statutory declarations.
- ☐ Check the secondary Claimant has signed the last section on page 3 (only if applicable).
- ☐ Certified copy of the death certificate or Medical Cause of Death Certificate.
- ☐ Certified copy of the Will (if the deceased left a Will).
- ☐ Certified copy of the evidence of the relationship to the deceased e.g. marriage or birth certificate.
- ☐ Certified copy or original bank statement/deposit slip, if the bank account you've provided for payment is not a Westpac New Zealand bank account.
- ☐ Certified copy of all Claimants' 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 all Claimants' proof of address showing their name(s) (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.

If the withdrawal amount is more than \$40,000, you'll need:

- ☐ Fully completed application form by the deceased's Personal Representative, i.e. granted probate or 'Letters of Administration' (see 'How do I qualify?').
- ☐ Check the primary Personal Representative has completed and signed the statutory declaration and it has been witnessed and signed by a person authorised to take statutory declarations.
- ☐ Check the secondary Personal Representative has signed the last section on page 3 (only if applicable).
- ☐ Certified copy of Probate or Letters of Administration.
- ☐ Certified copy or original bank statement/deposit slip if the bank account you've provided for payment is not a Westpac New Zealand bank account.
- ☐ Certified copy of all Personal Representatives' 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 all Personal Representatives' proof of address showing their name(s) (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

Deceased details

☐ Mr

☐ Mrs

☐ Miss

☐ Ms

☐ Other (please specify)

Date of birth

DD

MM

YYYY

Name

FIRST

MIDDLE

LAST

Previous address

NUMBER & STREET

SUBURB

TOWN/CITY

POSTCODE

IRD number

Westpac KiwiSaver Scheme member number

K

S

Claimant/Personal Representative's details

Primary Claimant/Personal Representative's details:

This is where confirmation of your withdrawal request will be sent.

☐ 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

Occupation

Relationship to deceased

Solicitors Details (if applicable)

Solicitor's name

Company name

Phone

BUSINESS

MOBILE

Email

Secondary Claimant/Personal Representative's details (if applicable):

☐ 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

Occupation

Relationship to deceased

Solicitors Details (if applicable)

Solicitor's name

Company name

Phone

BUSINESS

MOBILE

Email

Your payment details

Please provide us with a New Zealand bank account that is either solely or jointly held in the Primary Claimant/Personal Representative's name (i.e. not a Trust account or business account). If approved, the withdrawal will be paid to your nominated account. If the bank account below is not a Westpac New Zealand bank account, you'll need to supply a certified copy or original bank statement/deposit slip. If payment is being made to a Solicitor's account please provide a deposit slip

Account holder's name

FIRST

MIDDLE

LAST

Account number

BANK

BRANCH

ACCOUNT NUMBER

SUFFIX

Statutory declaration

1. Eligibility to withdraw government contributions

I declare that to the best of my knowledge and belief, the deceased's principal place of residence since the deceased first joined a KiwiSaver scheme was in New Zealand.* (Please tick only one.)

- ☐ Yes (Continue to the 'Your statutory declaration' below.)
- ☐ No (Please list below, excluding any overseas holidays where the deceased remained a New Zealand resident. Then continue to the 'Your statutory declaration' below.)

| | | | |
|----------|----------------------|------|--|
| Lived in | <input type="text"/> | from | Date DD / MM / YYYY to Date DD / MM / YYYY |
| Lived in | <input type="text"/> | from | Date DD / MM / YYYY to Date DD / MM / YYYY |

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

2. Your statutory declaration

It must be completed and signed in front of a Justice of the Peace, a Solicitor, Notary Public or other person authorised to take a statutory declaration. Please note that Westpac staff cannot complete this statutory declaration.

| | |
|--|------------|
| I PRIMARY CLAIMANT/REPRESENTATIVE NAME | OCCUPATION |
| of ADDRESS | |

Solemnly and sincerely declare that:

- I have read and understood the Privacy Statement (**see below**).
- I understand that if the information in this application is incomplete or incorrect, the Manager of the Westpac KiwiSaver Scheme will not be able to complete its assessment of this application.
- I understand that the withdrawal value will be based on the unit price(s) applying at the date that this withdrawal request is processed, so may be subject to change. It can be affected by market volatility, PIE tax rebates or deductions and additional contributions received (withdrawal amount).
- The account holder permanently resided in New Zealand for the full duration of their Kiwisaver membership, other than the periods (if any) listed in the 'Eligibility to withdraw government contributions' section.
- I am entitled to make this claim and that all the information provided in this form (and any included materials) is true and complete.
- In consideration of the Manager paying out the withdrawal amount I personally undertake to indemnify the Manager, the Supervisor, Trustees Executors Limited, Westpac and Westpac NZ against any claims, liability, losses, damages, costs and expenses whatsoever that may be incurred or suffered by the Manager, the Supervisor, Trustees Executors Limited, Westpac and Westpac NZ, by reason of the Manager, the Supervisor, Trustees Executors Limited, Westpac and Westpac NZ relying on the above information and releasing the withdrawal amount as requested.
- I will apply the withdrawal amount proceeds from the withdrawal in the course of the administration as the law requires.

Balances \$40,000 or less and claim being under section 65, Administration Act 1969 (where applicable).

I declare that the deceased (please tick only one):

- ☐ Left a Will, and Probate has not and will not be applied for or
- ☐ Did not leave a Will, and Letters of Administration have not and will not be applied for.

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

PRIMARY CLAIMANT/PERSONAL REPRESENTATIVE TO PRINT THIS FORM AND SIGN AND DATE THE STATUTORY DECLARATION IN FRONT OF YOUR WITNESS.

| | |
|-------------------|-----------------------|
| SIGNATURE PRIMARY | Declared at TOWN/CITY |
|-------------------|-----------------------|

Before me (a person authorised to take a statutory declaration in accordance with the New Zealand Oaths and Declarations Act 1957 - see above for further information):

| | | | |
|-----------------------|-------|------------|---------------------|
| Name of witness | STAMP | | |
| Declared at TOWN/CITY | | Occupation | Date DD / MM / YYYY |
| Signature of witness | | | |

Secondary Claimant/Personal Representative signature (only if applicable):

I have sighted this form and confirm all details are correct to the best of my knowledge and belief.

| | |
|--|---------------------|
| SECONDARY CLAIMANT/REPRESENTATIVE NAME | |
| SIGNATURE SECONDARY | Date DD / MM / YYYY |

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"

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

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/or Trustees Executors Limited (the registry provider), and may also 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).
