Westpac KiwiSaver Scheme Subsequent Retirement Withdrawal Application





How do I qualify?

- · Have reached age 65 and
- · Have already made a retirement withdrawal from the Westpac KiwiSaver Scheme.

Important:

If you're making your first retirement withdrawal, use the Westpac KiwiSaver Scheme **Initial** Retirement Withdrawal Form. Go to **westpac.co.nz/kiwisaver/forms** or your local Westpac branch.

What can I withdraw?

If eligible, you can withdraw some or all the available balance in your Westpac KiwiSaver Scheme account.

When can I expect payment?

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

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, send us your form and supporting documents (if applicable):

Post: Westpac KiwiSaver Scheme, PO Box 695, Wellington 6140

Visit: Any Westpac branch

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**

Your checklist

Please ensure that you provide us with all the following:

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Certified copy or original bank statement/deposit slip, if the bank account you've provided is **not** a Westpac New Zealand bank account. (This is not required if you've provided this evidence for a previous withdrawal to the same account.)

Documents must be received by Westpac within 3 months of being certified.

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]".

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

Your details For security reasons, we'll contact you using your registered details on file. You can add or update your details anytime in Westpac One® online banking or by calling 0508 972 254. Get help at westpac.co.nz/update I MM I YYY) Other (please specify) Date of birth Miss Ms Name FIRST IRD number S Westpac KiwiSaver Scheme member number Find it in online banking or on your statement. Your withdrawal request I would like to (please tick only one): Withdraw my full available balance. If you select this option, then when your withdrawal is complete your account will be closed and you'll no longer be a member of the Westpac KiwiSaver Scheme. (minimum of \$500 per withdrawal) Make a partial withdrawal of \$ Make a regular withdrawal of \$ (minimum \$100 per month) per (select one only): week fortnight (allow 10 business days) starting on date month For partial/regular withdrawals only If you're requesting a regular withdrawal, then it will replace any existing regular withdrawals you already have set up. If you're invested in more than one fund, the withdrawal will be deducted proportionately across each of the funds you're invested in. If you'd like the withdrawal to be deducted differently, please specify the dollar amount you'd like to withdraw from each fund below. Your payment details Please provide us with a New Zealand bank account that is either solely or jointly held in your name (i.e. not a Trust account or business 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. (This is not required if you've provided this evidence for a previous withdrawal to the same account.) Account holder's name Account number

Privacy statement

BANK

BRANCH

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 NZ's Privacy Policy (available at westpac.co.nz/privacy).

ACCOUNT NUMBER

SUFFIX

Your declaration

PLEASE PRINT THIS FORM AND SIGN THIS SECTION

I declare that:

- · I have read and understood the Privacy Statement above.
- 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 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, and additional contributions received.
- I agree that, if I withdraw my full account balance, my account will be closed, and I will no longer be a member of the Westpac KiwiSaver Scheme.

My signature	Date DD / MM / YYYY

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)					