

# Westpac KiwiSaver Scheme Permanent Emigration Withdrawal Application (excluding Australia)



## How do I qualify?

To be eligible for this type of withdrawal, you must:

Have permanently emigrated from New Zealand more than one year ago, and now be living in a country that's not Australia.

### Important:

- If you've permanently emigrated to Australia, use the Westpac KiwiSaver Scheme Transfer to a Complying Australian Super Fund Form.
- If you're aged 65 or over, use the Westpac KiwiSaver Scheme Initial or Subsequent Retirement Withdrawal Form.
- Go to [westpac.co.nz/kiwisaver/forms](https://westpac.co.nz/kiwisaver/forms) or any Westpac New Zealand branch.

## What can I withdraw?

If approved, you'll withdraw the full available balance of your Westpac KiwiSaver Scheme account excluding:

- Any government contributions, which we'll repay to Inland Revenue.
- Any amounts you've previously transferred from an Australian complying superannuation scheme. These funds will remain in your KiwiSaver account after the withdrawal and your KiwiSaver account will remain open.

## When can I expect payment?

Once you've submitted your completed application form and all supporting documents, an assessment will be made. Generally, your withdrawal amount will be paid to your nominated bank account within 10 business days, if approved. We'll let you know the outcome of your withdrawal request.

## Need help?

If you're not sure whether you qualify, need help completing this form, or want 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](mailto: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, send us your form and supporting documents:

**Courier:** Westpac KiwiSaver Scheme, Level 4 Cityside, Westpac on Takutai Square, 53 Galway Street, Auckland 1010, New Zealand

**Post:** Westpac KiwiSaver Scheme, PO Box 934, Auckland 1140, New Zealand

**Visit:** Any Westpac New Zealand branch

## Your checklist

Please ensure that you provide us with all of the following:

- ☐ Your fully completed application form.
- ☐ Check your statutory declaration has been completed, signed and witnessed by a person authorised to take statutory declarations.
- ☐ Evidence of emigration from New Zealand, such as a plane ticket, passport page(s) showing your departure, or an international movements/travel record issued by a government agency. In New Zealand, a travel movements record can be obtained from the New Zealand Customs Office at: [customs.govt.nz/about-us/travel-movements-request](https://customs.govt.nz/about-us/travel-movements-request)
- ☐ A certified copy of acceptable identity documentation (such as the photo and signature pages of your signed passport, or both sides of your New Zealand driver licence).
- ☐ A certified copy of proof of your **overseas** 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.
- ☐ A certified copy or original bank statement/deposit slip (showing your name and account number in English), if the bank account you've provided for payment is not a Westpac New Zealand bank account.
- ☐ If any of your supporting documents are not in English, a certified translated copy must be provided.

For a full list of acceptable identification and proof of address, go to [westpac.co.nz/AML](https://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"

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

### Important:

- If you're outside New Zealand, check if the person who takes your statutory declaration can also certify your documents. Refer to page 3 for more information.

## 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. Email is our preferred way to contact you.

☐ 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

Name

Physical address

Postal address (if different)

Phone   Email

Westpac KiwiSaver Scheme member number           IRD number

Prescribed Investor Rate (PIR\*) ☐ 10.5% ☐ 17.5% ☐ 28%. Find yours at [ird.govt.nz/pir](http://ird.govt.nz/pir)

## Your withdrawal request

I have permanently emigrated from New Zealand to  on date

- If you've previously transferred funds from a complying Australian superannuation scheme, they will stay in your account and your KiwiSaver account will remain open.
- If you have no Australian funds, your full balance will be withdrawn, and your Westpac KiwiSaver Scheme account will be closed. Our confirmation of your withdrawal request will provide notice of this.

## Your payment details

I would like to (please tick only one):

☐ **Have my withdrawal paid into my New Zealand bank account below.**  
This must be either solely or jointly held in your name and must not be a Trust account or business account. If this bank account isn't a Westpac New Zealand bank account, you'll need to supply a certified or original bank statement/deposit slip.

Account holder's name

Account Number

BANK

BRANCH

ACCOUNT NUMBER

SUFFIX

☐ **Have my withdrawal paid into my overseas bank account by Telegraphic Transfer.**  
This must be either solely or jointly held in your name and must not be a Trust account or business account. You'll need to provide proof of your overseas bank account number – refer to Your checklist on page 1.

Beneficiary account name    Beneficiary bank

Branch address

Account number or International Banking Account Number (IBAN)

Swift code  BSB sort code   
Also called Clearing Code, Rating/ABA/Fedwire, IFSC code, ZA number, CC number

### Please be aware of the following when choosing the overseas bank account option:

- Westpac Banking Corporation (New Zealand branch) is the Westpac provider of international payments and charges a fee of NZD15.00.
- Payment and handling charges and commissions are also often levied by other overseas intermediary and beneficiary banks. These charges will be deducted from the international payment and therefore will decrease the amount received in the beneficiary account.
- Transmission of funds will occur after a withdrawal has been approved. Westpac can give no general assurances on the timing of receipt of the funds by the beneficiary.
- For the full terms and conditions for international payments please see International Payments in the Westpac General Terms and Conditions at [westpac.co.nz/general-terms-conditions](http://westpac.co.nz/general-terms-conditions)

## 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 Manager's address, 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](https://westpac.co.nz/privacy)).

## Statutory declaration

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

### 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.

If outside New Zealand, please choose someone from the list below to make the statutory declaration:

#### Commonwealth country:

- Judge
- Commonwealth representative at an embassy
- Notary public
- Solicitor of the High Court of New Zealand
- Commissioner of Oaths
- Justice of the Peace
- Any other person authorised by the law of that country to administer an oath there for the purpose of a judicial proceeding

#### Non-Commonwealth country:

- Judge
- Commonwealth representative at an embassy
- Notary public
- Solicitor of the High Court of New Zealand

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 permanently emigrated from New Zealand more than one year ago and have no intention to return to New Zealand.
- I understand that if I make a permanent emigration withdrawal, I am not entitled to any government contributions. Any government contributions entitlement that have been paid to my KiwiSaver account will be deducted from my withdrawal amount and returned to the Inland Revenue.
- 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 understand that the exchange rate prevailing when my transfer is made will apply (foreign exchange fees may also apply). I acknowledge that Westpac has no liability for any losses suffered as a result of it converting currencies and that I am responsible for any exchange risks from the conversion of currencies.
- 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.

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

My signature	Declared at TOWN/CITY	Date DD / MM / YYYY
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**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):

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

STAMP
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