



All of the deceased's Personal Representatives must complete this form, which means by the persons who have been granted:

- Please note where Probate/Letters of Administration are not required to be applied for and the value of the amount available for withdrawal is \$40,000 or less, any of the persons set out in the box at the end of the form may be entitled to complete this form.

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) \_\_\_\_\_ Date of birth DD / MM / YYYY

1. ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) \_\_\_\_\_ Date of birth DD / MM / YYYY

2. ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) \_\_\_\_\_ Date of birth DD / MM / YYYY

3. ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other (please specify) \_\_\_\_\_ Date of birth DD / MM / YYYY

Name	FIRST	MIDDLE	LAST
Home address	NUMBER & STREET		SUBURB
TOWN/CITY	POSTCODE		
Postal address (if different)	NUMBER & STREET		SUBURB
TOWN/CITY	POSTCODE		
Occupation	Phone		
Relationship to deceased (state if executor or administrator)			

C. Statutory declaration

1. I,  of

2. I,  of

3. I,  of

**Solemnly and sincerely declare that:**

- I am entitled to make this claim and that all the information which provided in this form and in all included materials is true and correct.
- I will apply the proceeds from the withdrawal in due course of administration as the law requires.
- **Balances \$40,000 or less (where applicable)** I declare that the deceased (select 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.
- I hereby agree to indemnify the Manager of the Westpac Retirement Plan against any claims, losses, damages, costs and/ or expenses whatsoever (including its own legal costs on a solicitor/client basis), which may arise in connection with the said investment or the payment of the balance therefore and also against all amounts the Manager may be called upon to pay and all costs (including its own legal costs on a solicitor/client basis), charges and expenses incurred in connection therewith.
- I understand that by completing this form I will be providing personal information which will be held securely by the Manager of the Westpac Retirement Plan and in accordance with Westpac’s Privacy Policy (available on the Westpac website at [westpac.co.nz/privacy](https://www.westpac.co.nz/privacy)). I have the right to access and correct this information subject to the provisions of the Privacy Act 2020 (as amended or replaced from time to time).
- And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

1. Name

Signature

Date

Declared at,

Before me (JP, solicitor, notary public, a Registrar or Deputy Registrar of the District Court or the High Court, or other person authorised to take a Statutory Declaration in accordance with the Oaths and Declarations Act 1957):

Signature

Date

2. Name

Signature

Date

Declared at,

Before me (JP, solicitor, notary public, a Registrar or Deputy Registrar of the District Court or the High Court, or other person authorised to take a Statutory Declaration in accordance with the Oaths and Declarations Act 1957):

Signature

Date

3. Name

Signature

Date

Declared at,

Before me (JP, solicitor, notary public, a Registrar or Deputy Registrar of the District Court or the High Court, or other person authorised to take a Statutory Declaration in accordance with the Oaths and Declarations Act 1957):

Signature

Date

## D. Payment details

Account Name

Account Number

Bank

Branch

Account Number

Suffix

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 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 Trust account please provide a deposit slip.

### Balances \$40,000 or less (where applicable)

Persons entitled to make a claim under section 65 (2) of the Administration Act 1969 include:

- Wife
- Husband
- Civil union partner
- Defacto partner
- Child
- Person beneficially entitled to estate under the Will or on intestacy
- Person appearing to be entitled to obtain administration of estate in New Zealand
- Person related by blood, marriage or civil union to the deceased who undertakes to maintain the children of that person who are minors
- Person who has custody and control of the children of the deceased who are minors.

### Please return the completed form and the following documents (as applicable):

- A certified copy of the Death Certificate or Medical Cause of Death Certificate
- A certified copy of the Will
- A certified copy of Probate or Letters of Administration
- In the case of a person claiming a balance \$40,000 or less, evidence of the relationship to the deceased e.g. Marriage/Birth Certificate
- A certified copy of acceptable identity verification documents for all claimants in Section B. This is usually by way of either a certified copy of a New Zealand passport or a New Zealand photo drivers licence. For a full list of acceptable documents, please go to [westpac.co.nz/aml](https://westpac.co.nz/aml)
- A certified copy of proof of address documents for all claimants 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
- A certified copy of bank deposit slip or statement for account to be credited if not a Westpac account.

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

Please mail to the Manager at: **Westpac Retirement Plan, PO Box 695, Wellington 6140** or visit any Westpac branch.

Please call us on **0800 808 012** between 8am and 5pm, Monday to Friday if you need any help.