



Please email the completed form to: **workplaceadmin@amp.co.nz**

or post to:

**NZRT Freepost 170, PO Box 55
Shortland Street, Auckland 1140**

We're here to help

If you have any questions, please contact us on **0800 800 267**

AMP State Sector Retirement Savings Scheme (SSRSS) Subsequent withdrawal form

If you have already made a withdrawal from your AMP SSRSS account, use this form to make a further withdrawal of some or all of your SSRSS savings or set up a regular withdrawal facility. Please note, this form cannot be used for Financial hardship, first home or permanent emigration withdrawals.

- Once we have received your Subsequent withdrawal form and it is approved, we will make a payment directly to your nominated bank account, as per your previous withdrawal form. (If you are changing your nominated bank account, please also complete the 'Nominated bank account' form).
- If there are any issues with your withdrawal application we will contact you.

This form can be completed on-screen by typing content directly into the PDF document. Please use block letters if you're not completing this form online. Once completed, please print the form, sign and send it to workplaceadmin@amp.co.nz. Alternatively post to the address above. Please note we are unable to accept a digital signature.

Have you transferred any UK sourced pension funds into a QROPS account in the SSRSS? Yes No

If you ticked "Yes" above, you are unable to use this withdrawal form. Additional rules and restrictions may apply - please talk to your adviser and request a QROPS withdrawal from.

A disclosure statement is available from your Adviser, on request and free of charge.

(a) Your personal details

Full name

Date of birth

Email

Mobile phone

Postal address

Postcode

Member number

IRD number

Prescribed Investor Rate (PIR) 10.5% 17.5% 28%

To help determine your PIR, go to amp.co.nz/pie or ird.govt.nz.

If a PIR is not selected or you supply an incorrect IRD number, the default rate of 28% will apply.

(b) How much would you like to withdraw?

A **regular*** withdrawal of \$

*Regular withdrawal payments are split proportionally across the funds you are invested in

Starting

To be paid Fortnightly Monthly Quarterly

A **partial** withdrawal of \$

Split Equally across all the funds I am invested in; or As outlined in the table below:

Investment fund(s)	Amount (\$)
Total	\$ <input type="text"/>

The **full** value of my SSRSS account (after deduction of any fees, expenses, taxes)

(c) Payment instructions

I authorise AMP to deposit the withdrawal amount stated in section (b) to my nominated bank account, as listed below.

Account name

Account number

Is the nominated bank account stated above the **same** as to the nominated bank account you used for your first withdrawal?

- Yes.**
- No.** In addition to this form, please complete the 'Nominated bank account' form and its supporting documentation

(d) Withdrawal details

Please tick one box below and ensure all requirements are attached.

Reason for withdrawal	Requirements (please tick)
<input type="checkbox"/> I am leaving the State Sector on attaining age 50	Leaving employment form attached <input type="checkbox"/> Statement from employer attached <input type="checkbox"/> Proof of age attached <input type="checkbox"/>
<input type="checkbox"/> I am partially retiring within 10 years of attaining New Zealand Superannuation age	Statement from employer advising future hours attached <input type="checkbox"/> Proof of age attached <input type="checkbox"/> I will continue to contribute to the Scheme OR <input type="checkbox"/> I will no longer contribute to the Scheme <input type="checkbox"/>
<input type="checkbox"/> I have attained New Zealand Superannuation age	Proof of age attached <input type="checkbox"/>
<input type="checkbox"/> I am a Teacher who has attained age 50	Proof of age attached <input type="checkbox"/>

(e) Your signature and declaration

I have reached/or will have reached the applicable qualifying date for the withdrawal on

- I acknowledge that the Privacy Act 1993 provides me with the right to request access to and/or correction of any of my personal information held by AMP (AMP in this context includes all the members of the AMP group of companies and their subsidiaries, associated companies and agents) or The New Zealand Guardian Trust Company Limited as Supervisor of the SSRSS. I understand that the information supplied by me with this Withdrawal Application will be used to process this Withdrawal Application and to administer my membership of the SSRSS (and may be disclosed for these purposes to third parties where relevant, including the Inland Revenue, my adviser, my employer's adviser, or another intermediary or distributor). I authorise AMP to obtain additional information in relation to this Withdrawal Application from any third party/entity. The information may also be used by AMP or third parties to offer me other products or services made available within the AMP group.
- I acknowledge that payment of the withdrawal amount is in partial (in the case of a nominated sum less than the balance of my account) or in full (in the case of the total balance) settlement of my rights and interests under the SSRSS and I indemnify the Supervisor, AMP and any of their related companies against any liability in relation to such payment.
- I understand that fees may apply on my withdrawal.
- I understand that AMP may request additional information from me relating to this Withdrawal Application.
- I understand that if this Withdrawal Application is approved and a full payment of the total value of my savings is made, then my membership of the SSRSS will end.
- I confirm that I am not an undischarged bankrupt or incapable of managing my financial affairs and that I am properly entitled to any payment made pursuant to this Withdrawal Application and that no other person has any claim against it.
- I understand that this withdrawal is subject to the terms and conditions of the Specification Agreement.
- I do not have any UK pension funds transferred into a QROPS account within the SSRSS.

Member's signature

Date

Next steps:

- When all requirements are received (including any final contributions), we will process your withdrawal request within 8 working days. Your withdrawal will be processed at the unit prices effective on the day of your withdrawal. Any contributions received after the processing date will not be eligible for any further withdrawal under this facility.
- We'll send you confirmation of the amount of your withdrawal.