



AMP KiwiSaver Scheme

Foreign superannuation tax liability withdrawal form

Please send this completed form and supporting documents to:

AMP KiwiSaver Scheme
Freepost 170, PO Box 55
Shortland Street, Auckland 1140
Fax to 0800 509 955 or
Email kiwisaver@amp.co.nz

Please note that if you have transferred UK pension funds into your AMP KiwiSaver Scheme account under the Qualifying Recognised Overseas Pension Scheme regime, a withdrawal from your AMP KiwiSaver Scheme account to meet NZ tax liabilities could be considered an unauthorised payment by Her Majesty's Revenue & Customs (HMRC) and result in penalties payable to HMRC. AMP recommends that you seek independent, specialist advice before proceeding with this withdrawal.

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 you have completed and signed this form please send it and any supporting documents to the address above.

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

*These fields must be completed

(a) Your personal details

*Member number

Title

Mr Mrs Ms Miss Dr Other

Date of birth

*First names

*Surname

*IRD number

*Email

*Postal address

Home phone

Work phone

Mobile phone

PIE tax rate 10.5% 17.5% 28%

We deduct PIE tax from your withdrawal using the information we have at the time your withdrawal is paid. If you're unsure of your PIE tax rate, please go to www.amp.co.nz/PIE for help or contact your Adviser or Inland Revenue.

(b) Withdrawal details

Please ensure you have provided a completed IRD Form IR496 with your application.

You can only make this withdrawal to pay tax or student loan repayments owing as a result of a foreign superannuation transfer (non-Australian schemes). Please note you cannot withdraw your crown contribution amount.

Amount for withdrawal (this amount must be no more than the sum of the withdrawal amounts from boxes 8 and 14 on the IR496 form):

1. Maximum tax withdrawal amount: \$ (Box 8 on IR496 form)

2. Maximum student loan withdrawal amount: \$ (Box 14 on IR496 form)

3. Total amount to withdraw from my KiwiSaver account¹: \$

¹This amount must be no more than the sum of 1 and 2, but can be less. When calculating this amount you must not include any crown contributions.

(c) Statutory declaration

*I (full name)

B L O C K L E T T E R S

*of (address)

B L O C K L E T T E R S

*Occupation:

B L O C K L E T T E R S

solemnly and sincerely declare that all the information provided in or with this Withdrawal Form is true and correct and that:

- 1. I have calculated the potential tax liability (using IRD form IR496) and have submitted an IR3 return declaring my foreign superannuation income.
2. I have included a copy of my completed IRD form IR496 as evidence of my tax and/or student loan liability.
3. My application for this withdrawal is being made within 24 months of the month my IR3 return was assessed.
4. I confirm that I joined the foreign superannuation scheme when I was a non-New Zealand tax resident; and I was a New Zealand tax resident at the time I transferred my foreign superannuation scheme into my KiwiSaver account.
5. I acknowledge that the payment will be made directly to the IRD on my behalf.
6. I understand that fees may apply on my withdrawal.
7. 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 Form and that no other person has any claim against it.
8. 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 Supervisor of the AMP KiwiSaver Scheme. I understand that the information supplied by me with this Withdrawal Form will be used to process this Withdrawal Form and to administer my membership of the AMP KiwiSaver Scheme (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 and/or the Supervisor to obtain additional information in relation to this Withdrawal Form from any third party/entity.

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

*Declared at (place) *this (date) D D M M Y Y Y Y

*Member's signature SIGN HERE

Before me (JP, Solicitor, Notary Public or other person authorised to take statutory declarations, such as Registrar or Deputy Registrar of the High Court or of any District Court or a member of Parliament).

*Name *of city (where signing)

*Occupation

SIGN HERE *Date D D M M Y Y Y Y

(d) For Adviser use only

AMP Adviser name (if applicable) B L O C K L E T T E R S

AMP Adviser number

FSPN (please use your QFE's FSPN if you are a QFE Adviser)

- I confirm that I am an
AFA (entitled to sell Category 1 Product)
AMP QFE Category 1 Adviser
Other

And I certify that the information provided in this Adviser Information Section is correct and that I have complied with the requirements of the Financial Advisers Act 2008 and all other applicable laws.

Signature of Adviser SIGN HERE

Date D D M M Y Y Y Y