

# AMP KiwiSaver Scheme

## Permanent emigration to Australia transfer application

Use this form to apply for a transfer of your KiwiSaver savings to a complying Australian superannuation fund.

We're here to help. If you have any questions when completing this form, please call us on **0800 267 5494** (+64 4 439 5858) or email **kiwisaver@amp.co.nz**.

### How to complete this form:

1. Complete the withdrawal form sections (a) – (d). You can complete this form on screen by typing directly into the pdf.
2. Complete the statutory declaration in section (e) in front of a person authorised to take statutory declarations and make sure they also certify your identification and address.
3. Include all documents listed below with your application.
4. Please email the completed form and supporting documents to:  
**kiwisaver@amp.co.nz**

or post to:

**AMP KiwiSaver Scheme**  
**Freepost 170, PO Box 55**  
**Shortland Street,**  
**Auckland 1140**  
**New Zealand**

Freepost within New Zealand only

### Documentation checklist:

- A letter from your Australian Superannuation fund confirming they accept KiwiSaver Scheme transfers and their bank account details for the transfer.
- Certified copy(s) of your identification\*
- Certified copy of your residential address\*
- Proof of your departure from New Zealand.
- Proof of permanent residence at an Australian address.

\*Must be initialled and dated by the person taking your statutory declaration.

### How long does it take?

When all requirements have been fulfilled and we have received confirmation from Inland Revenue about Government contributions (allow 7 – 10 working days for this), we'll process your withdrawal within 8 working days.

If payment is being made to your overseas bank account, please allow up to 15 days from date of payment for the funds to clear.

### We're here to help

 **0800 267 5494**

 **kiwisaver@amp.co.nz**

 **amp.co.nz**

### Important information



#### Eligibility

You are eligible to transfer your KiwiSaver savings if you have left New Zealand to live permanently in Australia and the Australian superannuation fund you are transferring to accepts transfers from New Zealand KiwiSaver Scheme providers.



#### Contact your Australian superannuation fund provider before completing this form

Please check with your Australian superannuation fund that they accept transfers from New Zealand KiwiSaver Scheme providers. They will need to provide you a letter confirmation of this and proof of their bank account to send with this application (refer to 'Documentation Checklist').



#### Government contributions

A transfer due to permanent emigration to Australia excludes Government contributions applied whilst living outside New Zealand.



#### Statutory declaration and certifying your documents

We are required by law to verify your identity and current residential address before processing a withdrawal. This is a requirement of the Anti-Money Laundering and Counter Financing of Terrorism Act 2009.

Please ensure the person who takes the statutory declaration in section (e) also certifies your identification and address.



#### Have you spoken to your financial Adviser?

The decision to transfer your KiwiSaver savings is an important decision and we recommend you seek financial advice. Call us on **0800 267 5494** (+64 4 439 5858) or contact your Financial Adviser.

## (a) Your personal details

Member number

Title

 Mr  Mrs  Ms  Miss  Dr  Other 

Date of birth

First names

Surname

IRD number

Email

Residential address

  
 Postcode

Postal address (if different from above)

  
 Postcode

Please provide at least one contact number

Home phone

Work phone

Mobile phone

Prescribed Investor Rate (PIR)

 10.5%  17.5%  28%

We may collect Portfolio Investment Entity (PIE) tax when your funds are transferred, using the information we have at the time you transfer. If your PIR has changed, please tell us your correct rate. To help determine your PIR, go to [amp.co.nz/pie](http://amp.co.nz/pie) or [ird.govt.nz](http://ird.govt.nz). If a PIR is not selected and has not been previously selected, or you apply an incorrect IRD number, the default rate of 28% will apply. Inland Revenue may also instruct AMP to apply a different PIR.

If you are a non-resident for New Zealand tax purposes, the 28% PIE tax rate should be used.

## (b) Complying Australian superannuation fund details

**Important:** You may be charged fees by your Australian complying superannuation fund to process the transfer and telegraphic transfer fees will apply.

Australian complying superannuation fund name

Postal address (if different from above)

  
 Postcode

Email

Phone number

Australian Business Number (ABN)

The following supporting documentation is required from your Australian superannuation fund provider:

- A letter, on their letterhead, confirming they accept KiwiSaver Scheme transfers
- The bank details to be used for the transfer payment (including any reference details needed).

## (c) Evidence of permanent emigration

Date of departure from New Zealand:

The following supporting documentation is required. Please provide **both**:

- Evidence of your permanent residence at an Australian address, for example:
  - a copy of a property sale and purchase agreement; or
  - tenancy/leasing agreement for an Australian property; or
  - a recent electricity or rates bill.

**and**

- Evidence of your departure from New Zealand, for example:
  - evidence of confirmed travel arrangements; or
  - copy of your passport page showing arrival stamp; or
  - international movements record or evidence of any necessary visas; or
  - evidence of Australian employment, i.e. a copy of a contract or letter from your Australian employer; or
  - evidence of your Australian tax status issued by the relevant Australian tax authority.

If you would like to check if your evidence will be satisfactory, call us on **0800 267 5494** (+64 4 439 5858) or email [kiwisaver@amp.co.nz](mailto:kiwisaver@amp.co.nz).

## (d) Your identity documents

Have the original document(s) ready to be certified by the authorised person completing your Statutory Declaration (next page). We're here to help if you need us. Call **0800 267 5494** (+64 4 439 5858) or email **kiwisaver@amp.co.nz**.

### Proof of identity – please complete one

**Option 1** ONE document from this section:

<input type="checkbox"/> NZ passport (identity page)	<input type="checkbox"/> NZ firearms licence
<input type="checkbox"/> Overseas passport (identity page)	<input type="checkbox"/> NZ certificate of identity

OR;

**Option 2**  NZ driver's licence **PLUS** (ONE of the of the documents from this section):

<input type="checkbox"/> Super Gold card	<input type="checkbox"/> NZ full birth certificate/birth certificate issued by foreign government
<input type="checkbox"/> NZ citizenship certificate/citizenship certificate issued by foreign government	<input type="checkbox"/> Bank statement or Inland Revenue statement issued in your name in the last six months

OR;

**Option 3**  18+ identity or Kiwi Access card **PLUS** (ONE of the documents from this section):

<input type="checkbox"/> NZ full birth certificate/birth certificate issued by foreign government	<input type="checkbox"/> NZ citizenship certificate/citizenship certificate issued by foreign government
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**IMPORTANT: Please provide a certified copy of your identity documents. These copies must have been certified within the last three months.**

### Proof of address

Please provide one of the documents below as proof of your **residential address**. The document must be **addressed to you**, and dated within the **last six months**.

- letter or invoice from utility company (eg. electricity, gas, phone, Sky TV)
- bank statement
- insurance policy or investment portfolio document
- current rental tenancy agreement
- letter from government agency (e.g. Inland Revenue, rates bill, vehicle registration)

**Statutory declaration is on the following page.**

## (e) Statutory declaration

This page must be completed in front of an authorised person who will witness the declaration and certify your documents.

Who can witness me making the declaration and certify my documents?

### In New Zealand

- Justice of the Peace  
visit [justiceofthepeace.org.nz](http://justiceofthepeace.org.nz) or Yellow Pages  
[yellow.co.nz](http://yellow.co.nz) to find one near you
- New Zealand solicitor
- Notary public
- Registry of Deputy Registrar of the High Court  
or of any District Court

### In Australia or other Commonwealth countries

- Judge
- Commissioner of Oaths
- Notary public
- Justice of the Peace
- Any person authorised by the law of that  
country to administer an oath there for the  
purpose of a judicial proceeding
- Commonwealth representative

### In a non-Commonwealth country

- Commonwealth representative
- Judge
- Notary public

I (full name of member)

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

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 application is true and correct and that:

- I have permanently emigrated from New Zealand to Australia and request my AMP KiwiSaver Scheme balance be transferred to the account in section (c).
- I have been a member of a KiwiSaver Scheme and my principal place of residence was New Zealand for the period(s):

From D D M M Y Y Y Y To D D M M Y Y Y Y

From D D M M Y Y Y Y To D D M M Y Y Y Y

From D D M M Y Y Y Y To D D M M Y Y Y Y

- I understand that any information I give to AMP or the Supervisor of the AMP KiwiSaver Scheme may be passed on to my chosen Australian complying superannuation fund provider as reasonably required and I authorise AMP to give such information in relation to this transfer as requested by my chosen Australian complying superannuation fund provider.
- All the information I have supplied in this application (and any attachments to this application) is true and correct.
- I understand that acceptance of this application is at the discretion of AMP, that fees may be charged by my Australian complying superannuation fund provider to process the transfer, and that telegraphic transfer fees will apply.
- I acknowledge that I have rights of access to, and correction of, the information held by AMP or the Supervisor of the AMP KiwiSaver Scheme subject to the provisions of the Privacy Act 1993 and amending legislation. I understand that the information supplied by me with this application and any other information provided in connection with my membership or my account, either by me, my employer, the Inland Revenue or any other party, will be used by AMP and the Administration Manager and/or any parties related to them to verify my identity, process this application and to administer my membership, and to operate, the AMP KiwiSaver Scheme and may be disclosed for these purposes to other parties where relevant, including the Supervisor, the Financial Markets Authority, the Inland Revenue, my employer, an adviser or other intermediary or to any other party as required. I also understand that these parties may share and disclose information to each other and any other parties for the purpose of administering my membership, and to operate, the AMP KiwiSaver Scheme. The information may also be used by AMP or third parties to offer me other products or services made available by the AMP group, and for market research purposes. I can access and if required correct my personal information by contacting AMP. I authorise AMP and/or the Supervisor to obtain additional information in relation to this application from any third party/entity.
- I acknowledge that there may be tax consequences when transferring my AMP KiwiSaver Scheme savings to an Australian complying superannuation fund, and that I am liable for any such tax consequences.
- I understand that any annual Government contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to Inland Revenue.
- I understand that my AMP KiwiSaver Scheme account will be closed upon my AMP KiwiSaver Scheme savings being transferred to my chosen Australian complying superannuation fund.
- I understand that following a transfer of my AMP KiwiSaver Scheme savings to an Australian complying superannuation fund, I will not be able to transfer them to a third country.
- I understand my chosen Australian complying superannuation fund provider may request additional information to support this application.
- I indemnify the Supervisor of the AMP KiwiSaver Scheme, AMP, and any of their related companies against all claims, actions, demands, proceedings, costs or expenses, damages or liability arising and discharge them from any liability in respect of my membership of the AMP KiwiSaver Scheme and/or any transfer made to an Australian complying superannuation fund.
- I understand that the "New Zealand-sourced" KiwiSaver savings in my Australian superannuation fund will not generally be able to be accessed until I reach the age of eligibility for New Zealand Superannuation (currently age 65).
- I understand that once my AMP KiwiSaver Scheme savings has been transferred to Australia, it will become (with a few exceptions) subject to the rules and regulation governing the Australian complying superannuation fund.
- I understand that AMP has recommended I obtain financial advice before requesting this transfer.

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

**Member's signature**

Declared at

SIGN HERE

PLACE

**Before me, authorised person to take a statutory declaration (refer to list of authorised people on page 4):**

Full name, title/office of person taking declaration

of city (*where signing*)

Occupation

I have sighted, **initialled and dated** today the original of each document identified in section (d) above verifying the identity and address of the person named in section (a) of this form. I confirm that the documents attached to this statement are true copies of those documents and that the documents provided represent the identity of the person named in section (a) of this form.

Documents to be certified:  Identification (section d)  Proof of address (section d)

I am not related to and do not live at the same address as the person named in section (a) of this form.

**Signature of person authorised to take declaration**

Date

SIGN HERE

D D M M Y Y Y Y

**If the person above has not been able to certify your documents please refer to and complete the Identity verification - Individual form available at [amp.co.nz](http://amp.co.nz).**