

March 2024

Under KiwiSaver, if you have permanently migrated to Australia you can apply for approval to transfer your funds to your Australian superannuation scheme ("Australian Superannuation Scheme"). Your Australian Superannuation Scheme must be what is referred to as a complying super fund, regulated by the Australian Prudential Regulation Authority (APRA). You also may wish to think carefully about transferring as once transferred to or from Australia, the balance cannot be withdrawn under the same circumstances including if you emigrate to a third country.

Complete the attached form **to apply to the Manager** to withdraw your account balance from the JMI Wealth KiwiSaver Scheme due to having permanently emigrated to Australia if approved, your KiwiSaver balance will be transferred.

### Application

To apply to transfer your KiwiSaver account following your permanent emigration from New Zealand to Australia, you will need to take the following steps:

1. Complete the JMI Wealth KiwiSaver Scheme transfer request form.
2. Complete the statutory declaration. It must be signed by a Justice of the Peace (JP), or equivalent person able to witness statutory declarations.
3. Attach evidence to satisfy the Manager that you have permanently migrated to Australia. This should include:
  - Proof of departure from New Zealand, such as travel documents
  - Certified copy of passport
  - Proof of an address in Australia that you have resided at since leaving New Zealand
  - Evidence to support your claim to have permanently emigrated, such as current address details, employment confirmation, power bills, bank statements.
4. Send the completed form together with the supporting documentation to us.
5. Contact your Australian Superannuation Scheme to send a formal request to us for your KiwiSaver funds to be transferred. This must include:
  - The name of the Australian Superannuation Scheme
  - The address of the Australian Superannuation Scheme
  - The Australian Superannuation Scheme's Australian Business Number (ABN) and Super Product Identification Number (SPIN)
  - The Australian Superannuation Scheme's bank account details for payment:
    - Bank name and address
    - Swift code
    - Account name
    - Account number
    - Evidence of account (copy of deposit slip, bank statement etc)
  - Your membership number in the Australian Superannuation Scheme.

Once your application and the Australian Superannuation Scheme's request have been considered, we will advise you of the outcome. If approved, your KiwiSaver account balance, including any government contributions, will be paid to your Australian Superannuation Scheme's bank account. Note, if your KiwiSaver account has any government contributions that were paid for a period which you resided outside New Zealand those will be repaid to the IRD.

Complete this form **to apply to the Manager** to withdraw your account balance from the JMI Wealth KiwiSaver Scheme due to having permanently emigrated from New Zealand to Australia.

JKS34A 22.03.2024

### Your details

Note, if you have not previously provided documents that verify your identity, you will need to provide it before a payment can be made. Bank fees and costs associated with the payment will be deducted from the payment.

<b>Name:</b>	<input type="text"/>	<b>IRD number:</b>	<input type="text"/> - <input type="text"/> - <input type="text"/>
<b>Date of birth:</b>	<input type="text"/> (dd/mm/yyyy)	<b>Phone:</b>	<input type="text"/> ( )
<b>Home address</b>			
<b>Town/ city</b>			<b>Post code:</b>
<b>Email:</b>			

### Evidence

I attach evidence of my permanent emigration from New Zealand  (please tick)  
 (eg, passport detail; evidence of travel arrangements; proof of residence at current address; power bills; employment details)

### Principal place of residence

I confirm that for the period which I have been a member of KiwiSaver, my principal place of residence was:

- Always in New Zealand
- New Zealand, except for the following periods:

<b>From</b>	<b>to</b>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Note:** do not include periods that you were overseas on holiday if NZ was still your principal place of residence.

### Statutory declaration

<b>I, (full name)</b> (Declarant)
<b>Address</b>
<b>Occupation</b>

#### Solemnly and sincerely declare, that:

I permanently emigrated from New Zealand to Australia on \_\_\_\_\_ (dd/mm/yyyy)

All the documents and information supplied in support of my application are a true and correct record of my permanent emigration from New Zealand and of the period where New Zealand was my principal place of residence while I have been a member of KiwiSaver. I make this solemn declaration conscientiously believing the same to be true, and by virtue of the Oaths and Declaration Act 1957.

**Signature of Declarant** \_\_\_\_\_

<b>Witness<sup>1</sup></b>			
<b>Declared at</b>	<b>this</b>	<b>day of</b>	<b>20</b>
<b>Before me</b>			

<sup>1</sup> A Justice of the Peace, or other person (e.g. notary public, solicitor, officer of the court) authorised to take and receive Statutory Declarations