

Medical Assurance Society KiwiSaver Plan Permanent Emigration (to Australia) Transfer Form

Please send the completed form along with the evidence required to:
MAS Superannuation,
PO Box 91976,
Victoria Street West,
Auckland 1142.



Important note about withdrawal requests for permanent emigration to Australia - please read

Eligibility to withdraw

You may apply to the trustees to transfer to an Australian complying superannuation fund at any time after you have permanently emigrated to Australia, so long as the Australian complying superannuation fund accepts your transfer.

Member details

Full name	Title	First name(s)	Surname		
Member number	IRD number		<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address	City		Country		
Email address	<input type="text"/>				
Phone number	Home	Work	Mobile		

Proof of identity

It is a requirement of the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 and MAS's own compliance procedures that all Members are formally identified. All applications to withdraw fully or partially must be submitted with one of the following ID options. Please note, that the ID you provide must be current, i.e. not expired.

Please select one of the following three options:

Option one

¹Certified verification of residential address.

²Certified copy of one of the following:

- Appropriate pages of New Zealand or overseas passport, containing your name, date of birth, photograph and signature.
- New Zealand firearms licence.
- New Zealand certificate of identity.
- Government issued national identity card containing your name, date of birth, photograph and signature.

ID type	<input type="text"/>				
ID number	Country	<input type="text"/>	Expiry date	<input type="text" value="dd-mm-yyyy"/>	

Option two

¹Certified verification of residential address.

²Certified copy of your New Zealand driver licence.

DL number

Expiry date

AND

²Certified copy of one of the following:

- ATM (EFTPOS), debit or credit card issued by a New Zealand registered bank (*provided your name and signature is on the card*).
- Bank account statement issued by a New Zealand registered bank in the last 12 months.
- Statement from the IRD issued in the last 12 months.
- SuperGold card.

Secondary ID type	<input type="text"/>				
Outline details	<input type="text"/>				

Option three

¹Certified verification of residential address.

²Certified copy of one of the following:

- 18+ card.
- New Zealand driver licence.
- Overseas driver licence and valid and current international driving permit.

ID number	<input type="text"/>	Expiry date	<input type="text" value="dd-mm-yyyy"/>
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AND

²Certified copy of one of the following:

- New Zealand or overseas full birth certificate.
- New Zealand or overseas citizenship certificate.

Secondary ID type	<input type="text"/>				
ID number	Country	<input type="text"/>	Expiry date	<input type="text" value="dd-mm-yyyy"/>	

1 Proof of residential address

- Proof of your physical address is required. Please supply a certified copy of one form of the following documents issued within the last 12 months: utility bill, bank account statement, IRD statement, rates bill, car registration document, residential tenancy agreement, hire purchase agreement or some other formal document that confirms your physical address.
- If your MAS adviser meets you at your residence, they are able to provide confirmation of your address.

2 Certification

- Copies of ID can be certified as true copies with an original signature by a NZ Police Constable, NZ lawyer, NZ chartered accountant, registered medical doctor, Justice of the Peace, notary public or member of Parliament. The full name of the certifier and their capacity to act as a certifier, and the date of certification (date no more than three months prior to the date of the application) must be clearly noted. The certifier must sight the original ID and make a statement to the effect that documents provided are true copies and represent the identity of the named individual. The certifier cannot be related to the applicant or a person living at the same address.
- A MAS employee is able to confirm that documents provided are true copies by sighting the original documentation.
- When certification occurs overseas, copies of required documentation must be certified by a person authorised by law in that country to take statutory declarations.

UK pension transfers

Have you transferred money in from a UK Pension Scheme after 5 April 2006?

Yes. Please contact us for further information. An extra withdrawal form is required.

No.

Australian complying superannuation fund details

I wish to transfer to the following scheme:

Please check your Australian superannuation provider is willing to accept your transfer.

Your Member reference details

Your Australian tax file number

Name of fund

Australian Business Number (ABN)

Australian provider name

Provider street address

City

Postcode

Provider email address

Provider phone number

Proof of emigration

The KiwiSaver Act requires you to provide the following evidence of permanent emigration:

(i) Proof of departure from New Zealand (e.g. evidence of confirmed travel arrangements, passport evidence, evidence of any necessary visas, evidence of a full time job).

(ii) Proof that you have resided at an overseas address since your departure from New Zealand (e.g. utility bills).

Consent

The information in this form and any required supporting documentation is being collected to enable the trustee, Medical Assurance Society (MAS) or its authorised agents to administer all aspects of this withdrawal request. Under the Privacy Act 1993 you have the right to access and correct any personal information held by MAS.

- I understand that any information I give to the trustee may be passed on to my chosen Australian superannuation fund as reasonably required and I authorise the trustee to give such information in relation to this transfer as is requested by my chosen Australian superannuation fund.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver savings to an Australian superannuation fund, and that I am liable for any such tax consequences.
- I acknowledge that the trustee recommends that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- I understand that my KiwiSaver account will be closed upon my savings being transferred to my chosen Australian superannuation fund.
- I understand that following a transfer of my KiwiSaver savings to an Australian superannuation fund I will not be able to transfer them to a third country.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation fund cannot accept the transferred funds.

Consent (cont.)

- I acknowledge that on the receipt of my funds by the Australian superannuation fund, the trustee will be released from all liabilities in respect of my membership in the Medical Assurance Society KiwiSaver Plan.
- I understand that the 'New Zealand sourced' savings in my Australian superannuation fund will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (*currently 65*).
- I understand that once my KiwiSaver savings have been transferred to Australia, they will become (with a few exceptions) subject to the standard rules and regulations governing the Australian superannuation fund.
- I understand the Australian superannuation fund may require additional information from me before my application is processed.

Signature

Statutory declaration

Your statutory declaration must be made before someone authorised to witness statutory declarations in Australia or New Zealand, such as a solicitor, Justice of the Peace or court registrar.

I solemnly and sincerely declare that:

- I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver; or
- I was living overseas for the following period/s:

and I understand I do not qualify to be paid the member tax credit/s for this period.

I apply to withdraw the balance of my KiwiSaver account and I understand that:

- a withdrawal of my KiwiSaver account balance in the case of permanent emigration is subject to trustee approval; and
- before my application is approved I am required to:
 - complete the statutory declaration contained in this form; and
 - provide proof of the date I left New Zealand (e.g. copies of airline tickets, passport or other documentation showing my departure); and
 - provide evidence of my overseas residential address (e.g. utility bill, bank statement, etc.).

I solemnly and sincerely declare that the information I have provided in this Permanent Emigration Transfer form is true and correct.

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

Member signature

Declared at

Location

Witnessed by

Insert stamp here - include registration number

Witness signature

Date

dd-mm-yyyy

Justice of the Peace, solicitor or other person authorised to take a statutory declaration - please include your registration number.

Checklist

- Proof of identity and of address under option one, two or three.
- Consent section signed.
- Statutory declaration signed and witnessed.
- Evidence of permanent emigration included.

Call us today:
0800 800 627
Visit us online at mas.co.nz


KiwiSaver
Poua he Oranga

KSAV10 04/17

