

Medical Assurance Society KiwiSaver Plan Withdrawal Form

Please send the completed form along with the evidence required to:
MAS Superannuation,
Freepost 884,
PO Box 91976,
Victoria Street West,
Auckland 1142.



Important note about withdrawing - please read

The Medical Assurance Society KiwiSaver Plan is a superannuation scheme and has certain criteria around withdrawals. Savings are locked-in until the age of entitlement for New Zealand superannuation (currently 65) or you have been a Member of KiwiSaver for five years, whichever happens later. This form is for Members who meet these eligibility requirements. Please note that it requires at least three days for withdrawal requests to be processed. This may be longer as Inland Revenue are required to confirm your final Member Tax Credit eligibility. Please contact us should you wish to apply to withdraw your funds under any of the following special circumstances: significant financial hardship, serious illness, permanent disability, permanent emigration, relationship property separation.

Member details

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

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

¹Proof 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.

²Certification

- 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.

Withdrawal details

Please choose your preferred type of withdrawal from the options below. A withdrawal payment can only be made into your bank account as we do not make third party payments, other than to MAS.

Withdrawal details

- Full withdrawal Please close my account. I understand that once my account is closed I will be unable to open a new KiwiSaver account.
- Leave my account open – I will continue to contribute.
- Regular monthly withdrawal Amount \$ (\$100 minimum)
- Start date dd-mm-yyyy (allow at least five working days)

Payments will be paid on the 15th of each month, or the prior working day if this falls on a weekend or public holiday.

- Partial withdrawal Amount \$ (\$500 minimum)

Partial withdrawals will be deducted proportionally from each investment fund unless otherwise selected below:

Fund	Cash	Conservative*	Moderate*	Balanced	Growth	Aggressive	Global Equities
Amount	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

*Note: Conservative was previously called Defensive and Moderate was called Conservative.

Payment details

Please provide the bank account to make payment to. Please attach proof of bank account, e.g. bank statement, deposit slip or signed screen print of your internet bank accounts.

Bank Branch Account number Suffix

Name of account

Statutory declaration

If this is your first retirement withdrawal (excluding Australian sourced funds) please complete the statutory declaration below. This is not required for subsequent withdrawals.

I solemnly declare that:

- I have had my principal residence in New Zealand for the entire period that I have been a member of KiwiSaver.
- I was living overseas for the following dates to (please add a separate list if required), and I understand I do not qualify to be paid the member tax credit/s for this period.

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

Signature	<input type="text"/>	Declared at	<input type="text"/>	Location	<input type="text"/>
Witnessed by	<input type="text"/>			Insert stamp here	<input type="text"/>
Signature	<input type="text"/>	Date	<input type="text" value="dd-mm-yyyy"/>		

(Please note: this may only be witnessed by a Justice of the Peace, solicitor or other person authorised to take a statutory declaration as set out in the Oaths and Declarations Act 1957.)

Checklist

I have:

- Completed all parts of this form.
- Signed and dated the statutory declaration.
- Had the statutory declaration duly authorised (if this is a first retirement withdrawal).
- Attached proof of bank account to make payment to.
- Attached proof of identity and of address under Option one, two or three.

