

MAS Retirement Savings Scheme

Permanent Emigration Withdrawal Application Form



Please send completed form and supporting documents by post to:

MAS Superannuation
FREEPOST 884
PO Box 91976
Victoria Street West, Auckland 1142

For assistance:

Phone 0800 627 738
Email masinvest@linkmarketservices.com

i Important information

- You may apply to the Manager, Medical Funds Management Limited, to withdraw your funds if you are permanently emigrating from New Zealand. Your application will be processed as soon as is practically possible.
- You will need to provide proof of emigration.
- This Form only applies to members of the Workplace Savings Section.
- Please complete all sections of this form. An incomplete form may cause delays in the processing of your application.

1. Your information

Full name	<input type="text" value="Title"/>	<input type="text" value="First names (s)"/>	<input type="text" value="Surname"/>
Member number			Date of birth <input type="text" value="dd-mm-yyyy"/>
Postal Address	<input type="text"/>		
	<input type="text" value="City"/>	<input type="text" value="Postcode"/>	
Phone number	<input type="text" value="Home"/>	<input type="text" value="Work"/>	<input type="text" value="Mobile"/>
Email	<input type="text"/>		
Prescribed investor rate (PIR)	10.5%	17.5%	28%

Please refer to ird.govt.nz/pir for more information on how to determine your PIR.

2. UK pension transfers

Have you transferred money in from a UK Pension Scheme after 6 April 2006?

Yes. Please complete Section 8.

No

3. Payment details

Please provide your bank account details. We can only pay your withdrawal to your New Zealand bank account; we can't pay third parties. Please attach proof of bank account, e.g. bank statement, deposit slip or signed screen print of your internet bank accounts. If you have provided us with this verification in the last 12 months, you do not need to provide it again.

Bank Branch Account number Suffix

Name of account

I wish to transfer to an authorised foreign superannuation scheme.

Name of scheme

Address of scheme

Please provide information containing terms and conditions related to the scheme (e.g. prospectus or other offer documentation).

4. Proof of emigration

Please provide the following evidence of permanent emigration:

- (i) Proof of departure from New Zealand (e.g. evidence to confirmed travel arrangements, passport evidence, evidence of any necessary visas, evidence of full time job).
 - (ii) Documentation confirming your departure from New Zealand (e.g. letter from employer, proof of home ownership, utility bills).
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5. Identification requirements

The Anti-Money Laundering and Countering Financing of Terrorism Act 2009 requires MAS, on behalf of the Manager, to verify the identity of new investors and, periodically, reconfirm information about existing investors.

Please select one of the options below.

Option One: Electronic Identity Verification and Proof of Address

MAS can confirm the identity and/or New Zealand address of many of our investors electronically, with their permission. Please note that we use a third-party system not owned by MAS to conduct identity checks in this way.

I confirm that I give MAS authority to check my identity and/or address electronically using the documentation provided.

I have included a copy of my current NZ Passport (page showing name, date of birth, photo and signature) or NZ Driver Licence (front & back).

Please note, if this method fails to identify you, we will contact you to provide physical documents, as per Option 2 below.

OR

Option Two: Certified copies of identity and address documents

If you have opted not to use Electronic Identity Verification, then you will need to provide certified copies of the following documentation:

Please provide us with either

A certified copy of your current passport (page showing your name, date of birth, photo, and signature).

A certified copy of your New Zealand driver licence showing your name, signature and expiry date along with one of: certified copy of a bank statement issued to you by a registered NZ bank (dated within the last 12 months); valid credit or debit card with name embossed and signature; birth certificate; citizenship certificate; Government agency letter (e.g. IRD, Electoral Commission, etc.) dated within the last 12 months; SuperGold card with photo, name and signature.

A certified copy of your New Zealand firearms licence.

AND one of the following showing your name and residential address (which can't be more than 90 days old):

A certified copy of a utility bill (power, gas, water, landline phone, SKY or internet service).

A certified copy of a document issued to you by a NZ Government agency (e.g. IRD, ACC, Ministry of Justice NZQA, or WINZ).

A certified copy of a NZ council rates notice/valuation.

A certified copy of a residential rental agreement.

Who can certify your documents?

A MAS employee can verify your ID and proof of address. Alternatively, the following people can certify photocopies of original documents:

- Registered medical doctor
- Notary Public
- Justice of the Peace
- Member of the Police
- New Zealand lawyer
- New Zealand Chartered Accountant
- A person who has legal authority to take statutory declarations (or equivalent) in New Zealand.

The certifier must:

- See the original document and make a statement to the effect that the documents provided are true and correct copies and confirm the identity of the named individual;
- State their full name and their capacity to act as a certifier; and
- Date the certification (no more than three months prior to the date of the application).

The certifier cannot be related to you or a person living at the same address, or a party of the application.

When certification occurs overseas, copies of the required documentation must be certified by a person authorised by law to take statutory declarations.

Please note carefully the requirements above. If we need to ask for further information, this will delay the processing of your application.

6. Declaration

To the Manager, I do solemnly and sincerely declare that:

- I am permanently emigrating or have permanently emigrated from New Zealand.
- I confirm that the information provided in this form is true and correct.

Signature

Date

Member name

7. Checklist

Make sure you send us everything listed below, as we can't consider your request without the following:

- Your completed application.
- Evidence of permanent emigration included.
- Proof of identity and of address.
- Proof of bank account.
- UK pension transfer details (if applicable).

8. UK pension transfers

For Members who have transferred funds into their account from a UK pension scheme on or after 6 April 2006

i Important information

You should ensure that you understand what the NZ and UK tax implications are for you before you receive a benefit from the MAS Retirement Savings Scheme.

The Manager, Medical Funds Management Limited, recommend that you seek tax advice in relation to the NZ and UK tax consequences that may arise on making a withdrawal from the MAS Retirement Savings Scheme.

The Manager does not accept responsibility for any NZ and UK tax consequences that may arise from you making a withdrawal from the MAS Retirement Savings Scheme.

Please complete the following

What is your UK National Insurance Number?

Please advise the date of your UK pension transfer

Have you been resident in the UK for UK tax purposes at any time during the current UK tax year or in the 5 UK tax years immediately preceding the current UK tax year? Or 10 UK tax years if you transferred on or after 6 April 2017?

Yes

No

Please advise the date in which you ceased living in the UK: Day

Month

Year

Approximately how much time have you spent in the UK in the last 6 years?

Less than 6 months

More than 6 months

If your UK pension transfer occurred before 6 April 2017 you may withdraw funds from the MAS Retirement Saving Scheme without being subject to UK tax law if you have not been a UK taxpayer for the current and any previous five full UK tax years.

For withdrawals where your UK pension transfer took place on or after 6 April 2017 you may withdraw funds from the MAS Retirement Saving Scheme without being subject to UK tax law if:

- you have not been a UK taxpayer for the current and any previous 10 full UK tax years, and
- it has been 5 full UK tax years since you transferred.

All withdrawals from your account are required to be reported to UK pension authorities for the 10 years from your effective transfer date or within 10 years of you being a UK tax resident.

In making reports to HMRC on withdrawals and transfers from the MAS Retirement Saving Scheme, we will treat any withdrawal or transfer as begin first from the UK pension transfer component of your balance.

You may only make a withdrawal or transfer in accordance with UK law. This includes meeting the usual minimum pension age in the UK (currently age 55), and ensuring any transfer is only to another recognised overseas pension scheme.

You can find out more at mas.co.nz/uk-pension-transfers or by contacting MAS on 0800 800 627.

I acknowledge that I have read and understood the information set out above.

Investor's Signature

Date

For assistance:
Phone **0800 627 738**
Email masinvest@linkmarketservices.com

