

Please send completed form and supporting documents by post to:
 masinvest@linkmarketservices.com

You can also choose an option below to return your documents.

Post:

MAS
 FreePost 884
 PO Box 91976
 Victoria Street West, Auckland 1142

Or send by courier to:

MAS
 Level 30 PwC Tower
 15 Customs Street West
 Auckland 1010

i Important information

You should use this form to apply to withdraw a deceased member's MAS KiwiSaver Scheme account balance.

This form can be completed by the following:

- The person(s) who have been granted probate if the deceased left a will.
- The person(s) who have been granted letters of administration if the deceased did not leave a will.
- Any relevant person(s) below if no probate or letters of administration have been granted and the deceased member's MAS KiwiSaver Scheme account balance is less than \$40,000.

Relevant person(s) are:

- The surviving spouse, civil union partner, de facto partner or children of the deceased.
- The person beneficially entitled to the estate of the deceased under a will or intestacy.
- Any person entitled to obtain administration of the estate of the deceased.
- Any person related by blood or marriage or civil union to the deceased who undertakes to maintain the children of that person who are minors.
- Any person who is providing day-to-day care for any of the minor children of the deceased.

Procedure for completing this form:

1. Complete all sections of the form.
2. Attach:
 - A certified copy of the Death Certificate; and either
 - Where the deceased left a will - a certified copy* of the will, and the grant of probate**; or
 - Where the deceased did not leave a will, certified copy* of the letters of administration**; and
 - A bank deposit slip (where payment is to be credited to a bank account).
3. Complete the Statutory Declaration

The Statutory Declaration must be made by a deceased's personal representative or a lawyer acting on their behalf in front of a lawyer, Justice of the Peace, Notary Public or other person authorised to take Statutory Declarations.

* Document copies must be certified as true copies by a lawyer, Justice of the Peace, Notary Public or responsible officer of a Trustee Company.

** For accounts less than \$40,000 where Probate or Letters of Administration are not being applied for, please provide your full name and address in the relevant section.

1. Deceased member's personal details

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" value="City"/> <input type="text" value="Postcode"/>		

2. Details of all personal representatives or lawyer acting

Full name

Title	First names (s)	Surname
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Postal Address

City	Country	Postcode
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Phone number

Home	Work	Mobile
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Email

Full name

Title	First names (s)	Surname
-------	-----------------	---------

Postal Address

City	Country	Postcode
------	---------	----------

Phone number

Home	Work	Mobile
------	------	--------

Email

Full name

Title	First names (s)	Surname
-------	-----------------	---------

Postal Address

City	Country	Postcode
------	---------	----------

Phone number

Home	Work	Mobile
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Email

3. Payment details

Please provide the details of a New Zealand bank account held in the name of the personal representatives or solicitor's trust account, and attach proof of the account, such as a bank statement, deposit slip, or a screenshot of your online banking account.

Account name

Account number

4. Statutory declaration

This section must be completed in front of an authorised person who will witness the declaration and certify your documents. A Statutory Declaration must be signed and dated within the past 3 months.

Who can witness the declaration?

As set out in the Oaths and Declarations Act 1957, declaration made in New Zealand can be witnessed by:

- Justice of the Peace
- Solicitor or barrister of the High Court
- Registry of Deputy Registrar of the District or High Court
- Notary Public or other person authorised to take a statutory declaration.

I

of

and

Do solemnly and sincerely declare that:

My relationship with the deceased was

To the best of my knowledge, the deceased's principal residence was in New Zealand for the entire period that he/she was a member of KiwiSaver.

The deceased lived overseas for the following dates to
(please add longer list if required)

Balance under \$40,000

I declare the deceased (please select one):

Left a Will, and Probate has not and will not be applied for; or

Did not leave a Will, and Letters of Administration have not and will not be applied for.

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

Signature Declared at

Witnessed by

Occupation

Signature Date

5. Identity Verification Requirements

We are required to verify the identity of all personal representatives listed in Section 2, including confirming your name, date of birth and address. You can choose one of the options below to evidence your identity:

Option 1: Electronic Identity Verification

We can confirm your identity and/or New Zealand address electronically by using a third-party system not owned by MAS. We request your permission to verify your identity in this way:

If you do not have New Zealand identity documents, we cannot electronically verify your identity, and you will need to go to Option 2.

- 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 either my current:
 - New Zealand Passport (page showing name, date of birth, photo and signature); or
 - New Zealand Driver License (front and back).

Please note, if we can't successfully identify you via the electronic method, we will contact you to provide identity documents as per Option 2.

OR

Option 2: Identity documents

If you have opted not to use Electronic Identity Verification or do not have New Zealand identity documents, you will need to provide verified or certified copies from one of the following selections:

Selection 1

- A current Passport (page showing your name, date of birth, photo, and signature); or
- A current New Zealand firearms license; or
- National Identity ID Card (that shows full name, date of birth and photo)

Selection 2

- New Zealand Driver License (front and back)
- Plus one of the following:*
- Bank statement issued to you by a registered New Zealand bank (dated within the last 12 months)
 - Credit or debit card issued to you by a registered New Zealand bank (that shows your name and signature)
 - A statement from a Government department dated within the last 12 months (e.g. a letter from Inland Revenue, Electoral Commission, ACC, etc.)
 - SuperGold card with photo, name and signature.

Selection 3

- New Zealand full birth certificate; or
- New Zealand Certificate of Citizenship; or
- Overseas birth certificate or certificate of citizenship

Plus one of the following:

- New Zealand drivers licence
- Kiwi Access Card (or 18+ Card)
- International drivers licence (that shows your full name and photo)

If your identity documents have different names, you must also include proof of your name change, e.g. marriage certificate.

If the document is not in English, a translated must be provided.

Together with one of the following as proof of address that shows your name and residential address dated within the **last 12 months:**

- Utility bill (power, gas, water, internet service or rates bill)
- Bank statement issued by a New Zealand registered bank
- A statement issued to you by a NZ Government department (e.g. Inland Revenue, ACC, Ministry of Justice, NZQA, or Work and Income New Zealand)
- A residential rental or tenancy agreement
- A letter from your employer confirming your address

If you're not able to provide evidence of your permanent residential address in New Zealand, please contact us to discuss.

Verification and certification of identity documents

All identity documents need to be either certified by an “AML Trusted Referee” or verified by a MAS employee, for example, your MAS Adviser. Copies must be current and legible, with all photos clearly visible. **Certification is only valid for 3 months.**

A certifier/verifier must:

- See the original document (e.g. Passport or drivers licence)
- Make the following statement:
“I [certify/verify] that this is a true copy of the original document sighted by me and represents the true likeness of the individual”
- Sign and date the copy and print their name and capacity as an AML Trusted Referee

The certifier/verifier cannot be:

- related to you (i.e. parent, child, sibling, uncle, aunt etc)
- your spouse or partner
- a person living at the same address
- a party to the application.

Who can certify/verify your identity documents?

A MAS employee, like your MAS Adviser, can verify your identity documents; or

AML Trusted Referees, who must be located in New Zealand, can certify photocopies of original documents. Persons that can certify photocopies of original documents are listed below.

Persons able to certify documents:		Persons able to certify documents and witness statutory declarations:
<ul style="list-style-type: none">• Registered medical doctor• Chartered Accountant• Registered teacher• Minister of Religion	<ul style="list-style-type: none">• Police Officer• Kaumātua• New Zealand Honorary Consul• Member of Parliament	<ul style="list-style-type: none">• Justice of the Peace• Solicitor or barrister of the High Court• Registrar or Deputy Registrar of a District or High Court• Notary Public or other person authorized to take a statutory declaration

If you are not based in New Zealand and need to provide certified identity documents, please contact us to discuss.

6. Checklist

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

Your completed application.

Statutory declaration.

Certified copy of Death Certificate.

Certified copy of the will (if applicable).

Certified copy of grant of Probate or Letters of Administration (if applicable).

Proof of bank account.

Evidence of identity and address (as applicable for the option you have selected under section 5).