

Permanent emigration withdrawal form

Summer
My Plan

Complete this form and return it to **Salt Investment Funds Limited via email: info@summer.co.nz.**
Or by mail to PO Box 2673, Auckland 1140.

My details

Full name:		
Date of Birth:		
Day	Month	Year
Mailing Address:		
Street no./Name/PO Box:		
Suburb/RD no.:		
Town/City:	Postcode:	
Country:		
Primary contact number:		
Email:		

Withdrawal request

I confirm that I have permanently emigrated from New Zealand and have been a resident in:

Country of residence:		
Since (date):		
Day	Month	Year

We require the following proof that you have permanently emigrated:

- Proof of departure (e.g. evidence of confirmed travel arrangements, passport and any necessary visas).
- Proof that you have resided at an overseas address at some time during the year since departing New Zealand (e.g. utility bill, bank statement, or rental agreement).

Payment details

Bank account

Please indicate the bank account you wish to have your monies credited to. **Please enclose a bank encoded deposit slip.**

Bank:	Branch:		
Account name:			
Bank Account:			
Bank	Branch	Account Number	Suffix

Bank account:

Payments are only payable to a New Zealand bank account.

We can only accept bank accounts in your name or a joint account that includes your name. No trust, estate or other entities will be accepted.

Please turn over

Verification of identity: We share this information securely and confidentially with our identification providers to verify your identity (as required by law). Please see our privacy policy for more detail. You can view this online at www.summer.co.nz/privacy-policy or call us on 0800 11 55 66 to request a copy. **If you do not have New Zealand Identity documents, please provide a certified copy of your overseas passport or call us on 09 243 1020.**

Verification of identity

To get your Summer KiwiSaver scheme withdrawal underway we need to verify your identity. To help us do this, in the following section, please provide as much information as possible. It is necessary to complete at least one of the two options.

NZ Driver licence number:

Driver licence version:

Vehicle registration number:

NZ Passport number:

Passport issue date:

Day

Month

Year

Passport expiry date:

Day

Month

Year

Minors: If the member is under the age of 18, one of the member's parents/guardians must also complete *Agreement and signature Parent/Guardian*.

Declarations: Please ensure you print your name in full along with recording your current address and occupation.

Agreement and statutory declaration

I:

(full name of person making declaration)

Of:

(address of person making declaration)

Occupation:

(occupation of person making declaration)

Solemnly and sincerely declare that:

- I am entitled to make this claim and that all the information provided in this form and in all included materials is true and correct.
- I have lived in New Zealand since opening my KiwiSaver account, or (if otherwise) I have detailed below the periods for which my principal place of residence was not in New Zealand since opening my KiwiSaver account. I verify that the completed withdrawal form and supporting documents attached are true and correct to the best of my knowledge.

I confirm that I have resided/will reside mainly in New Zealand for the period

1 July to date: **OR**

Day

Month

Year

I confirm that I have not resided/will not reside mainly in New Zealand for the period

1 July to 30 June but I am/was an employee of the State services under the State Sector Act 1988 serving outside New Zealand for this period. **OR**

I confirm that I have not resided/will not reside mainly in New Zealand for the period

1 July to 30 June but I worked/will work overseas as a volunteer or for token payment for a charitable organisation named in regulations made under the Student Loan Scheme Act 1992 and the work meets 1 or more of the requirements in sections 38AEA(a)(i) to (iii) of that Act for this period. **OR**

I confirm that I have not resided/will not reside mainly in New Zealand for the period

1 July to 30 June

- I understand that any information I give to Salt Investment Funds Limited or its affiliates may be passed on to an entity that is involved in the administration or management of the Summer KiwiSaver scheme (including the Inland Revenue) and I authorise Salt Investment Funds Limited or its affiliates to give such information in relation to this withdrawal.

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

Date:

Day

Month

Year

Declared at: this day of

20

place

date

month

year

Please turn over

Agreement and signature Parent/Guardian

I/we authorise Salt Investment Funds Limited to make the changes in accordance with the instructions on this form.

Name of parent/legal guardian:

Date:

Day		Month		Year			

Witness

Witness: A statutory declaration must be made before a person entitled to witness a statutory declaration under the Oaths and Declarations Act 1957. This includes a barrister and solicitor of the High Court, a Justice of the Peace, a notary public, the Registrar or Deputy Registrar of the High Court or of any District Court and a Member of Parliament. Please contact us if you require further information.

Witness to complete (being a person authorised under the Oaths and Declarations Act 1957):

Name:

Occupation:

Address:

Date:

Day		Month		Year			

Checklist

Please check that you have included the below with your application prior to returning the form (and supporting documentation) to Salt Investment Funds Limited via email: info@summer.co.nz. Or by mail to PO Box 2673, Auckland 1140.

Please provide a certified copy of identity following our guidelines (see below)

A bank encoded deposit slip or bank account verification

Signed and witnessed statutory declaration (see the Witness section for more information on persons authorised to witness statutory declarations)

Proof of departure from New Zealand

Evidence of your residential address overseas

Certification guidelines

- Acceptable documents – current passport (including your photo and signature pages) or Drivers Licence (back and front). If these are foreign documents, they need to be translated into English.
- Certification must be within the last twelve months.
- The certifier must be: a JP; Chartered Accountant; Lawyer; Police Officer; Registered Teacher; Registered Doctor, or any other person who has legal authority to take statutory declarations. The certifier cannot be your spouse, partner, relative, or living at the same address as you.
- Upon comparing the copy with the original document, the certifier must write on the copy their name, occupation, their signature, the date and the following statement: "I certify this to be a true copy of the original document and confirm that it represents the identity of [full name of person being identified]."

For Office Use Only:

Account number:

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