

First or second chance home withdrawal form

Summer
KiwiSaver Scheme
My Plan

Complete this form and return it (along with additional supporting documentation) to
Forsyth Barr Investment Management Limited, Private Bag 1999, Dunedin.

My details

Full name:																					
Date of Birth:	<table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Day</td><td>Month</td><td>Year</td><td colspan="7"></td></tr></table>											Day	Month	Year							
Day	Month	Year																			
Primary contact number:																					
Email:																					
Residential address:																					
Street no./Name/PO Box:																					
Suburb/RD no.:																					
Town/City:	Postcode:																				
Country:	<input type="checkbox"/> New Zealand <input type="checkbox"/> Other (please state):																				

What can be withdrawn?

*If a first home purchase withdrawal is permitted then you can withdraw everything from your account other than:

- \$1,000
- any amount transferred to KiwiSaver from a UK pension scheme, or an Australian complying superannuation scheme

Second-Chance Home Withdrawal: This applies if you have held an estate in land before but no longer have a share in property. If you are applying for a second-chance home withdrawal you will need to attach confirmation from Housing New Zealand that you qualify.

Withdrawal details

Type of withdrawal (please tick one)

- First Home withdrawal **or** Second-Chance Home withdrawal

Amount of withdrawal

Subject to the requirements of the KiwiSaver Act 2006 and the Trust Deed for the Scheme, I request:

- A partial withdrawal of \$ _____ from my Scheme account; or
- A withdrawal of all available* funds from my Scheme account.

How withdrawal amount permitted will be applied (please tick one)

- The funds withdrawn will be applied (in the first instance towards paying a deposit on the property); or
- The funds withdrawn will be applied solely towards paying the purchase price of the property at settlement.

Solicitor Details

Solicitor name:	
Solicitor's company name:	
Mailing address:	
Street no./Name/PO Box:	
Suburb/RD no.:	
Town/City:	Postcode:
Country: New Zealand	
Email:	

Please turn over

10. I have:
- not held an estate in land before; or
 - held an estate in land before, but it was a leasehold estate, or I held it as (a) a bare trustee; or (b) as a trustee who (i) is a discretionary, contingent, or vested beneficiary under the relevant trust; but (ii) had no reasonable expectation of being entitled to occupy the land as my or my family's principal place of residence until the death of the person who then currently occupied the land (the occupier) or the death of the occupier's survivor; or
 - held an estate in land before, and I attach a notice in my name, signed by the Minister of Housing or delegate, which states that the Minister of Housing or delegate is satisfied that my income, assets, and liabilities represent a financial position that would be expected of a person that has never held an estate in land.
- I understand that should the information given within this withdrawal form be incomplete or incorrect, the Manager will not be able to complete its assessment of my application without receiving the complete and correct information.
11. I understand that my application for a first or second-chance home withdrawal is subject to the approval of the Manager, and the Manager receiving:
- a pre-printed bank deposit slip for my solicitor's trust account; and
 - a certificate from my solicitor containing an undertaking (in a form acceptable to the Manager) relating to the unconditional nature of the sale and purchase agreement and the application of funds withdrawn and enclosing a copy of the sale and purchase agreement which clearly shows me as the purchaser.
12. I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed.
13. I agree that any solicitor who has or will provide information about my first or second-chance home withdrawal may be approached by the Manager, and I hereby authorise such solicitor to give such further information in relation to this purchase as requested by the Manager. A photocopy of this authorisation shall be read as the original.
14. I solemnly and sincerely declare that the information provided by me is true and correct.

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

Signature:	Date: <table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td style="font-size: 8px;">Day</td> <td style="font-size: 8px;">Month</td> <td colspan="2"></td> <td colspan="2"></td> <td style="font-size: 8px;">Year</td> <td></td> </tr> </table>									Day	Month					Year	
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Declared at: <table style="display: inline-table; border: none; margin: 0 10px;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">this</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">day</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">of</td> </tr> </table> <table style="display: inline-table; border: none; margin: 0 10px;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">20</td> </tr> </table> <table style="display: inline-table; border: none; margin: 0 10px;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">place</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">date</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">month</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">year</td> </tr> </table>		this	day	of	20	place	date	month	year								
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20																	
place	date	month	year														

Witness

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

Name:																	
Occupation:																	
Address:																	
Signature of Witness:	Date: <table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td style="font-size: 8px;">Day</td> <td style="font-size: 8px;">Month</td> <td colspan="2"></td> <td colspan="2"></td> <td style="font-size: 8px;">Year</td> <td></td> </tr> </table>									Day	Month					Year	
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Checklist

Please check that you have included the below with your application prior to returning the form (and supporting documentation) to Forsyth Barr Investment Management Limited, Private Bag 1999, Dunedin.

- | | |
|---|---|
| <input type="checkbox"/> Current New Zealand identification, entered in the verification of identity section (if you don't have any New Zealand issued identification, please provide a certified copy of a foreign passport) | <input type="checkbox"/> An original solicitors certificate for deposit or settlement, on the solicitor's letterhead |
| <input type="checkbox"/> Signed and witnessed statutory declaration (see the Witness section for more information on persons authorised to witness statutory declarations) | <input type="checkbox"/> A bank encoded deposit slip for the solicitors trust account |
| <input type="checkbox"/> Copy of Sale and Purchase Agreement | <input type="checkbox"/> A confirmation letter of eligibility from Housing New Zealand (if you have previously owned a house and are applying under second chance provisions) |

For Office Use Only:

Account number:

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- Member records updated where applicable for new contact details

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.