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Transfer to an Australian superannuation fund

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.**

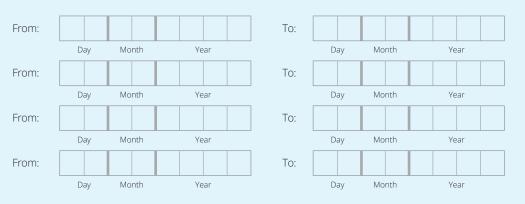
You will be eligible to transfer your KiwiSaver savings to an Australian complying superannuation fund regulated by the Australian Prudential Regulation Authority if you have left New Zealand to live permanently in Australia and the Australian complying superannuation fund you are transferring to accepts your transfer (they will need to provide you a letter of confirmation). Please ensure you complete all sections below.

My details

	Full name:									
n Tax File If unknown, stralian Tax site w.au	Date of Birth: Day Month Year Australian Tax File number:									
	Mailing address:									
	Street no./Name/PO Box:									
	Suburb/RD no.:									
	Town/City: State: Postcode:									
	Country: Australia									
	Primary contact number:									
y of the tax etails differ we currently	Email:									
cord, they ated based / information pefore , this transfer	Prescribed Investor Rate (PIR): 10.5% 17.5% 28%									
d. If you have ing outside of nd for more ays you will esident for	Australian complying superannuation fund details Australian Complying Superannuation Fund membership number:									
es and the twill apply.	Superannuation Product Identification Number (SPIN):									
	Australian provider name:									
	Australian Complying Superannuation Fund name:									
	Australian Business Number (ABN):									
	Mailing address:									
	Street no./Name/PO Box:									
	Suburb/RD no.:									
	Town/City: State: Postcode:									
	Country: Australia									
	Email:									

Principal place

of residence: For example, 1 have been a KiwiSaver member since 1 July 2007 and lived in New Zealand until 20 August 2010 when I moved to Australia'. You would note in the boxes on the right 1/7/2007 to 20/8/2010. You only need to note the dates you were actually residing in New Zealand. Please specify below, the periods during your KiwiSaver membership when your principal place of residence was New Zealand:



Trans-Tasman permanent emigration transfer instructions

I confirm that I have permanently emigrated to Australia and request my Summer KiwiSaver scheme balance to be transferred to my account in the Australian complying superannuation fund named on the previous page.

Date I left New Zealand:

Dav	Month	Ye	ar	

As per the KiwiSaver Scheme Rules we require the following proof that you have permanently emigrated:

- Proof of departure (e.g. evidence of confirmed travel arrangements, physical or digital airline ticket, passport or any necessary visas).
- Proof that you have resided at an Australian address at some time since departing New Zealand (e.g. utility
 or rates bill, telephone bill, bank or credit card statement, Government Agency statement, insurance policy,
 or rental agreement).

Verification of

identity: We share this information securely and confidentially only with our identification providers to verify your identity (as required by law). Please see our terms and conditions for more detail. You can view these online at www.summer.co.nz/ account-terms 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 and visa details. or call us on 0800 11 55 66.

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 licer	nce number:				Driver licer	ice version:	
Vehicle regi	stration num	ber:					
NZ Passpor	t number:						
Passport issue date:				Passport expiry date:			
	Day	Month	Year		Day	Month	Year

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.

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).

Proof of departure.

Proof that you have resided at an Australian address at some time since departing New Zealand.

A letter from the Australian complying superannuation fund you are transferring to, confirming they are willing to accept the transfer from KiwiSaver.

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.

Agreement and signature

The information in this form and any required supporting documentation is being collected so a decision can be made regarding your transfer request. Forsyth Barr Investment Management Limited and affiliates and Trustees Executors Limited (the "Supervisor") have access to this information.

- I understand that any information I give to Forsyth Barr Investment Management Limited may be passed on to my chosen Australian complying superannuation fund provider as reasonably required, and I authorise Forsyth Barr Investment Management Limited to give such information in relation to this transfer as requested by my chosen Australian complying superannuation fund provider.
- I understand that any information I give to Forsyth Barr Investment Management 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 Forsyth Barr Investment Management or its affiliates to give such information in relation to this withdrawal.
- I acknowledge that there may be tax consequences when transferring my Summer KiwiSaver scheme savings to an Australian complying superannuation fund, and that I am liable for any such tax consequences.
- I acknowledge that Forsyth Barr Investment Management Limited has recommended that I seek independent and professional Australian and New Zealand tax advice pertaining to my circumstances in relation to the proposed transfer.
- I understand that any annual member tax credit contribution entitlement I have received during my membership period whilst residing outside of New Zealand will be deducted from my withdrawal amount and returned to the Commissioner of Inland Revenue.
- I understand that my Summer KiwiSaver scheme account will be closed upon my Summer KiwiSaver scheme savings being transferred to my chosen Australian complying superannuation fund.

- I understand that following a transfer of my Summer KiwiSaver scheme savings to an Australian complying superannuation fund I will not be able to transfer them to a third country.
- I understand that my transfer request is subject to Forsyth Barr Investment Management Limited approval and that Forsyth Barr Investment Management Limited may request additional information in support of this transfer request.
- I understand that my transfer request will be unable to be processed if my chosen Australian complying superannuation fund named in the 'Australian complying superannuation fund details' section of this transfer request does not accept the transferred funds.
- I acknowledge that on the receipt of my funds by the Australian complying superannuation fund, Trustees Executors Limited (the "Supervisor") and Forsyth Barr Investment Management Limited will be released from all liabilities in respect of my membership of the Summer KiwiSaver scheme.
- I understand that the 'New Zealand sourced' saving in my Australian complying superannuation fund will not generally be able to be accessed until the age of eligibility to New Zealand Superannuation is reached (currently 65).
- I understand that once my Summer KiwiSaver scheme savings have been transferred to Australia, it will become (with a few exceptions) subject to the rules and regulation governing the Australian complying superannuation fund.
- I understand the Australian complying superannuation fund may require additional information from me before my transfer request is processed.

Signature:	Date:							
		Day	y	Mo	nth	Ye	ar	

Agreement and signature Parent/Guardian

I/we authorise Forsyth Barr Investment Management limited to make the changes in accordance with the instructions on this form.

Name of parent/legal guardian:				
Signature:	Date:			
		Day	Month	Year

For Office Use Only:

Account number:				

Statutory Declaration



Complete this form and return it to Forsyth Barr Investment Management Limited, Private Bag 1999, Dunedin.

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

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 up if you require

contact us if you require further information.

Person making declaration

(full name of person making declaration)	
Of (address in full):	
Street no./Name/PO Box:	
Suburb/RD no.:	
Town/City:	ostcode:
Country: New Zealand	

Occupation:

I:

(occupation of person making declaration)

Do solemnly and sincerely declare that:

- 1. I have permanently emigrated to Australia.
- 2. All supporting documents provided with this application are 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:	Day	Month	Year
Declared at:		this	d	ay of				20
	place		date			month		year

Witness

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

Name:			
Occupation:			
Address:			
Address:			
	Date:		

For Office Use Only:

Account number:				
Account number.				