

Application for partial withdrawal to cover tax or student loan liabilities arising from a foreign superannuation transfer

Summer
KiwiSaver Scheme
My Plan

Complete this form within two years of your tax and/or student loan liability being assessed and return it (along with supporting documentation) to **Forsyth Barr Investment Management Limited, Private Bag 1999, Dunedin.**

A withdrawal to cover income tax and/or student loan liabilities resulting from a foreign superannuation transfer may trigger further tax penalties. You should seek specialist taxation advice before taking any action on your KiwiSaver account.

My details

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

Withdrawal Details

Partial withdrawal to cover income tax liability or partial withdrawal to cover student loan obligation.

| | |
|-----------------------------------|---|
| <input type="checkbox"/> | Withdrawal amount for tax liability: \$ |
| <input type="checkbox"/> | Withdrawal amount for student loan obligation: \$ |
| Total withdrawal amount \$ | |

If you are invested in more than one fund, please indicate how you wish your withdrawal to be processed across the different funds that you hold.

| Fund | <input type="checkbox"/> Percentage or | <input type="checkbox"/> Withdrawal amount \$ |
|------------------------------------|--|---|
| Summer New Zealand Cash | % | \$ |
| Summer New Zealand Fixed Interest | % | \$ |
| Summer Global Fixed Interest | % | \$ |
| Summer New Zealand Equities | % | \$ |
| Summer Australian Equities | % | \$ |
| Summer Listed Property | % | \$ |
| Summer Global Equities | % | \$ |
| Summer Conservative Selection | % | \$ |
| Summer Balanced Selection | % | \$ |
| Summer Growth Selection | % | \$ |
| Total (must add up to 100%) | % | \$ |

What can be withdrawn?

The withdrawal amount must not exceed the tax liability and/or student loan obligation arising from the transfer of foreign superannuation funds into your KiwiSaver account. The IRD IR496 form can be used to assist with calculating the withdrawal amounts. Crown contributions (Government contribution and/or the \$1000 Kickstart, if received) cannot be withdrawn.

Withdrawals from your KiwiSaver account cannot be used to cover foreign investment fund (FIF) income or any penalties and/or interest arising from the tax or student loan payment.

If you wish the funds to be deducted proportionally from each Fund that you have invested in please leave the table on the right blank.

Please turn over

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

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

| | | | | | | | | | | | | | | | | | | | | | |
|-----------------------|---|--|-------|--|--|------|--|--|--|--|--|-----|--|--|-------|--|--|------|--|--|--|
| Name: | | | | | | | | | | | | | | | | | | | | | |
| Occupation: | | | | | | | | | | | | | | | | | | | | | |
| Address: | | | | | | | | | | | | | | | | | | | | | |
| Signature of witness: | Date: <table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td colspan="3">Day</td><td colspan="3">Month</td><td colspan="4">Year</td></tr></table> | | | | | | | | | | | Day | | | Month | | | Year | | | |
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| 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.

- Copy of Inland Revenue tax assessment dated within two years confirming the amount of income tax and/or student loan liability
- 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)
- Signed and witnessed statutory declaration (see the Witness section for more information on persons authorised to witness statutory declarations)

For Office Use Only:

Account number:

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Member records updated where applicable for new contact details