

Application for withdrawal from the Summer KiwiSaver scheme on the grounds of a life-shortening congenital condition

Summer
KiwiSaver Scheme
My Plan

Use this form to apply for a withdrawal if you have a **life-shortening congenital condition**. Complete this form and return with all supporting evidence to **Forsyth Barr Investment Management Limited, Private Bag 1999, Dunedin**.

Life-shortening congenital condition means a condition that exists for a person from the date of their birth and for which you have medical evidence to verify that the congenital condition is expected to reduce life expectancy below age 65 for you specifically or for persons in general with the condition.

Section A - General

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 colspan="2">Day</td><td colspan="2">Month</td><td colspan="6">Year</td></tr></table>											Day		Month		Year					
Day		Month		Year																	
Residential address:																					
Street No./Name:																					
Suburb/RD No.:																					
Town/City:	Postcode:																				
Country:	<input type="checkbox"/> New Zealand <input type="checkbox"/> Other (please state):																				
Primary contact number:	Phone home:																				
Phone mobile:	Phone work:																				
Email:																					
Best time for us to contact you:																					

Please turn over

If you did not reside principally in New Zealand for any period, please specify the period(s):

Date of departure:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of return:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
	Day Month Year		Day Month Year		
Date of departure:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of return:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
	Day Month Year		Day Month Year		
Date of departure:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of return:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
	Day Month Year		Day Month Year		
Signature of member:			Date:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
				Day Month Year	
Declared at:		this	day of		20
	place		date	month	year

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:	<input type="text"/>
Occupation:	<input type="text"/>
Address:	<input type="text"/>
Signature of witness:	Date:
	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Day Month Year

KiwiSaver Act 2006 – Schedule 1

12B Withdrawal in cases of life-shortening congenital conditions

- 12B(1) A member may apply under this clause for a withdrawal, in addition to a withdrawal on the grounds of serious illness under clause 11(1)(g) or 12, when the member suffers from a condition that exists from the date of their birth—
- a. that is identified as a life-shortening congenital condition by a regulation made under section 228(1)(mb) (a listed condition); or
 - b. for which the member has medical evidence to verify that the congenital condition is expected to reduce life expectancy below the New Zealand superannuation qualification age for the member or for persons in general with the condition (a non-listed condition).

For Office Use Only:

Account number:

Member records updated where applicable for new contact details