

2: Countries of tax residence

Are you a current tax resident of another country (other than NZ)? Yes No

Are you a US Person (i.e. US citizen) for the purposes of the Foreign Account Tax Compliance Act (FATCA)? Yes No

US Persons are considered Tax Residents of the US. For more information, please refer to ird.govt.nz and search for 'FATCA'

If you answered Yes to either question above, please list all countries other than New Zealand in the table below.

Country of tax residence	Tax number (or equivalent)	No tax number (reason code^)	Please provide an explanation if using reason code B

^Reason codes

The country you declared you are a tax resident of:

A - The country does not issue tax numbers or equivalent to its residents.

B - You are unable to obtain a tax number or equivalent (please provide an explanation).

C - No tax number or equivalent is required for the country (note: only use this reason where the relevant country does not require the collection of a Tax Number or equivalent under domestic law).

3. Australian complying superannuation scheme details

Provider and scheme details

Australian provider name
Postal address
Email address
Phone number
Australian scheme name
Australian Business Number (ABN)

Superannuation product identification number

Member account details

(as held by the Australian complying superannuation scheme)

Member / Account number
Member / Account name

4. Payment details

All approved transfer amounts will be paid out of BNZ KiwiSaver in New Zealand dollars. Fees, service charges and other costs may be incurred in the payment of a transfer amount to an Australian complying superannuation scheme or in the conversion of the amount to Australian dollars. Any fees, service charges and other costs may be paid from the transferred balance.

If the Australian complying superannuation scheme will accept an electronic transfer of your BNZ KiwiSaver balance, please provide the account details below.

Swift code
BSB
Account number
Name of account

Any approved transfer balance will be paid to your Australian complying superannuation scheme via electronic transfer if possible.

5. Personal Information Notice

To offer and/or provide you with products or services we need to collect, use and disclose your personal information in accordance with BNZISL's Privacy Policy and BNZ's Master Privacy Policy. The privacy policies set out the purpose of this collection, details of how the information may be used or disclosed, your rights to that information (such as access and correction), BNZISL and BNZ's legal obligations and the consequences of not providing the information. These privacy policies are available on the BNZ website or you can ask BNZ for a copy.

For this specific product, your personal information will be used and shared for the purposes of:

- operating, administering, and managing BNZ KiwiSaver
- complying with legal obligations.

Third parties your information will be shared with include:

- the Supervisor of BNZ KiwiSaver
- BNZ and members of the National Australia Bank group of companies
- FirstCape group companies
- Inland Revenue
- Financial Markets Authority.

6. Statutory declaration

Please don't sign this section in advance.

It must be signed in front of a Justice of the Peace, a Solicitor, a Notary Public or, another person authorised to take an Oath or Declaration in accordance with section 9 (for declarations made in New Zealand) or section 11 (for declarations made outside New Zealand) of the Oaths and Declarations Act 1957.

I, <input type="text" value="Name"/>
of <input type="text" value="Residential address"/>
<input type="text" value="Occupation"/>

solemnly and sincerely declare that, having permanently emigrated from New Zealand on Date

<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
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I am now residing in Australia and:

- I wish to transfer my BNZ KiwiSaver balance to an Australian complying superannuation scheme.
- I have read and understood the Personal Information Notice set out in section 5 of this form.
- I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed.
- I acknowledge that on the receipt of my funds by the Australian complying superannuation scheme, BNZ, the Manager, and/or the Supervisor of BNZ KiwiSaver will be released from all liabilities in respect of my membership in BNZ KiwiSaver.
- I acknowledge that there may be tax consequences when transferring my KiwiSaver balance to an Australian complying superannuation scheme, and that I am liable for any such tax consequences.
- I acknowledge that BNZ 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 my BNZ KiwiSaver investment will be closed upon my KiwiSaver balance being transferred to my nominated Australian complying superannuation scheme.
- I understand that following a transfer of my KiwiSaver balance to an Australian complying superannuation scheme I will not be able to transfer them to a third country.
- I understand that my application is subject to Manager approval and that I may requested to provide additional information in support of this application.
- I understand that my application will be unable to be processed if my chosen Australian complying superannuation scheme named in section 2 of this application does not accept the transferred funds.
- I understand the Australian complying superannuation scheme may require additional information from me before my application is processed.
- I understand that fees, service charges and other costs may be incurred in the transfer of my BNZ KiwiSaver balance to my Australian complying superannuation scheme and that these may be paid from the transferred amount.
- If I am over 65, I meet the work test as set out in Australian Superannuation legislation.
- I understand that the "New Zealand sourced" balance in my Australian complying superannuation scheme will not be able to be accessed until the age of eligibility for New Zealand Superannuation is reached (currently 65).
- I understand that except as detailed above, once my BNZ KiwiSaver balance has been transferred to Australia, it will become (with a few exceptions) subject to the standard rules and regulations governing the Australian complying superannuation scheme.
- I solemnly and sincerely declare that the information I have provided in this BNZ KiwiSaver Scheme Australian emigration application form is true and correct.
- I acknowledge that the information contained in this form and information regarding the investment holder and any investment(s) may be reported to the tax authorities of the country/jurisdiction in which this investment(s) is/are maintained and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which the investment holder may be tax resident pursuant to intergovernmental agreements to exchange financial information.

- For any other BNZ products where I am an account holder, I undertake to advise BNZ within 20 days of any change in circumstances which affects the tax residency status of the individual(s) identified above in this form or causes the information contained herein to become incorrect or incomplete, and to provide BNZ a suitably updated self-certification and Declaration and relevant documentation (as requested) within 20 days (or a lesser period as requested by BNZ) of such change in circumstances.

Please select which one applies.

- During my KiwiSaver membership my principal place of residence was New Zealand; or
- During my KiwiSaver membership, there were periods when my principal place of residence was not New Zealand.

To the best of my knowledge, the specific periods during my KiwiSaver membership when my principal place of residence was outside New Zealand are:

<input type="text"/>
<input type="text"/>

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

<input type="text" value="Signature"/>
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Declared at

<input type="text" value="Location"/>

on Date

<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
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Before me:

Please print the name, address and occupation of the person taking the declaration, being a person authorised under the Oaths and Declarations Act 1957.

<input type="text" value="Name"/>
<input type="text" value="Occupation"/>
<input type="text" value="Signature"/>

To submit your application, please do one of the following:

- Email this form and all supporting documents to kiwisaver_support_team@bnz.co.nz
- Post this form and all supporting documents to:
Freepost BNZ KiwiSaver Scheme
Private Bag 92208,
Auckland 1142