

SuperEasy KiwiSaver Superannuation Scheme

First or Second-chance Home Withdrawal Application

Am I eligible to withdraw?

To be eligible to withdraw for a first home you must have been a contributing member of KiwiSaver for at least three years and not owned property before. If you have owned property before and are in the position of a first home buyer, you can apply for a second chance home withdrawal - you must first apply for approval through Housing New Zealand and submit the approval letter as part of your withdrawal application.

What can I withdraw?

You are able to withdraw your full available KiwiSaver balance excluding \$1,000 and any funds transferred from an Australian superannuation scheme.

What's next?

Once completed, scan and email this form and all additional information (see checklist in **Section F**), to admin@supereasy.co.nz, or you can post to:

SuperEasy
PO Box 5521
Wellington 6140

Please send the form to us at least two weeks before the funds are required for settlement or deposit. Any information missing from this application may delay your application.

Any Questions?

If you have any questions please contact us on 04 978 1250 or at admin@supereasy.co.nz

A. Personal details

Membership number	<input type="text"/>	Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	First name(s)		Surname				
Home address	Number & street		Suburb	Town/city		Postcode	
Postal address <small>(if different to above)</small>	Number & street		Suburb	Town/city		Postcode	
Phone	Home			Mobile			
Email address							

B. Your withdrawal request

Reason for withdrawal: First home withdrawal
This applies to applicants who have not held an estate in land before, whether alone or jointly with another person.

Second-chance home withdrawal
This applies to applicants who have held an estate in land before. You will need to attach confirmation from Housing New Zealand that you qualify for a second-chance home withdrawal.

Amount of withdrawal: My full available balance A partial amount of \$

Funds are for: Deposit on Settlement on

C. Solicitors details

Solicitors name	First Name		Surname				
Solicitors company name							
Solicitors address	Number & street		Suburb	Town/city		Postcode	
Phone				Email address			

E. Acknowledgement

By signing this form you acknowledge that:

- you are eligible to withdraw under the reason indicated in **Section B** of this form
- you have read and understood the Privacy Statement in **Section H** of this form
- the information provided in this form is true and correct, and will be used to update your membership information
- you understand that your withdrawal value will be based upon the unit price(s) at the date your request is processed

Signature

Date

More information required overleaf

F. Checklist

! Please send us all of the information in this checklist

- Completed application form, with Statutory Declaration (**Section G**) signed by a JP, Solicitor, notary public or person authorised to take a statutory declaration
- Certified** (must be signed by a JP or Solicitor) copy of some identification, this could be either:
 - a current passport; or
 - a NZ driver's licence (both sides) **and** either a **certified** copy of a statement from a registered bank, or a birth certificate
- Proof of address. Usually a utility bill or bank statement, this must have been issued within the last 12 months
- Solicitors trust account bank deposit slip
- Solicitors letter of undertaking. Contact us on 04 978 1250, or at admin@supereasy.co.nz for a template
- Copy of the Sale and Purchase agreement for the property
- Letter from Housing New Zealand confirming that you are eligible for a Second-Chance Home Withdrawal. **You only need to submit this if you have owned an estate in land before.**

G. Statutory declaration

To be eligible to withdraw any government contributions your principal place of residence must have been in New Zealand over that time. During your KiwiSaver membership, were there any periods when you lived overseas and did not have a permanent residence in New Zealand?

- No (continue to **Statutory declaration** below)
- Yes. List below the periods your principal place of residence was outside of New Zealand:

From	To
<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>	<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>
<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>	<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>
<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>	<input type="text" value="D D"/> <input type="text" value="M M"/> <input type="text" value="Y Y Y Y"/>

Note, that if you were working overseas as an employee of the New Zealand Government or as a volunteer for certain charitable organisations, you are still eligible to receive government contributions. If this is the case, please include evidence with your application.

Statutory declaration

I

of

and

do solemnly and sincerely declare that:

I understand that for the periods my principal place of residence was outside of New Zealand during my KiwiSaver membership, I will not be entitled to withdraw any government contributions received. Any government contributions claimed on my behalf during any such period will be returned to the Commissioner of Inland Revenue. The information provided in **Section G** is correct to the best of my knowledge.

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

Signature <small>(of person making the declaration)</small>	Date of declaration	<input type="text" value="D D"/>	<input type="text" value="M M"/>	<input type="text" value="Y Y Y Y"/>
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Before me:

JP, Solicitor, notary public, or person authorised to witness a statutory declaration under Section 9 of the Oaths and Declarations Act 1957

H. Privacy statement

The personal information you have provided in this Form, or that you provide in the future, will be collected and held by Civic Financial Services Limited as Administration Manager for purposes of marketing, operation and management of the SuperEasy KiwiSaver Superannuation Scheme, and compliance with any laws, rules and regulations in New Zealand, or in any other country, including the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 and the Common Reporting Standard for the Automatic Exchange of Information as it applies in New Zealand.

Your personal information may be disclosed to the following:

- Inland Revenue (who may share the information with overseas tax authorities under intergovernmental agreements to exchange financial account information)
- your employer
- Financial Markets Authority
- any other persons or entity

where it is relevant to do so for the purposes set out above.

If you do not provide some or all of the information requested in this form, we may not be able to accept your application.

You have the right to know what personal information the SuperEasy KiwiSaver Superannuation Scheme's Administration Manager is holding in respect of you. Pertinent details will be shown on your Member Statements. You also have the right to request that we correct your personal details if they are wrong. You can do this by contacting the Administration Manager at: Civic Financial Services Limited, PO Box 5521, Wellington 6140. Any update to your personal information may be used to update other information the Administration Manager holds for you.

Office use only

<p>Accepted (For and on behalf of the Trustee)</p>
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Date accepted

D	D	M	M	Y	Y	Y	Y
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