

SuperEasy KiwiSaver Superannuation Scheme

TRANS-TASMAN TRANSFER APPLICATION FORM

You will be eligible to transfer your Australian superannuation savings to a KiwiSaver superannuation scheme if you have left Australia to live permanently in New Zealand, and the New Zealand KiwiSaver scheme you are transferring to accepts your transfer.

MY DETAILS IN NEW ZEALAND

Title (Mr) (Mrs) (Ms) (Miss)	Date of Birth dd/mm/yy
First Names	Surname
Home Address	Postcode
Postal Address (if different from above)	Postcode
Email Address	Member Number
Telephone []	Your IRD number
Mobile	Fax []

NEW ZEALAND KIWISAVER PROVIDER DETAILS

Name of Provider	Civic Financial Services Ltd		
Provider Address	Civic Assurance House 116 Lambton Quay PO Box 5521 Wellington 6140 New Zealand		
Provider email Address	admin@civicfs.co.nz	Provider telephone	0011 64 4 978 1250

AUSTRALIAN COMPLYING FUND DETAILS

Provider Name	
Provider Address	
Provider Australian Business Number (ABN)	
Email Address	Membership number
Telephone []	

TRANS-TASMAN TRANSFER INSTRUCTIONS

I have permanently emigrated from Australia and request my Australian superannuation balance to be transferred to my SuperEasy KiwiSaver Superannuation Scheme.

Date you left Australia dd/mm/yyyy	
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PAYMENT DETAILS

Branch	North End, Lambton Quay, Wellington		
Account name	Local Government Global Superannuation		
Account number	01 0527 0165928 28		
SWIFT code	ANZBNZ22	Reference	(Completed by Civic Financial Services Ltd)

SuperEasy KiwiSaver Superannuation Scheme

116 Lambton Quay, PO Box 5521, Wellington 6140 | www.supereasy.co.nz | Email: admin@civicfs.co.nz | Tel: 04 978 1250 | Fax: 04 978 1260

CONSENT AND SIGNATURE

The information on this form and any required supporting documentation is being collected so a decision can be made regarding your withdrawal request. Civic Financial Services Ltd and its associated companies and Local Government Superannuation Trustee (the Trustee") have access to this information. Access is subject to strict security arrangements, and the Trustee and Civic Financial Services Ltd will comply with the Privacy Act 1993 when dealing with this information.

- I understand that any information I give to Civic Financial Services Ltd may be passed onto my Australian Superannuation fund as reasonably required and I authorise Civic Financial Services Ltd to give such information in relation to this transfer as requested by my Australian Superannuation fund.
- I acknowledge that there may be tax consequences when transferring my Australian savings to a New Zealand KiwiSaver scheme, and that I am liable for any such tax consequences.
- I acknowledge that Civic Financial Services Ltd 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 Australian Superannuation account will be closed upon my savings being transferred to my chosen KiwiSaver Superannuation provider.
- I understand that following a transfer of my Australian Superannuation savings to a New Zealand KiwiSaver scheme I will not be able to transfer them to a third country.
- I understand that my application is subject to Civic Financial Services Ltd's approval and that Civic Financial Services Ltd may request additional information in support of this application.
- I acknowledge that on the receipt of my funds by the SuperEasy KiwiSaver Scheme, the Trustee and Provider of my Australian Superannuation Scheme will be released from all liabilities in respect of my membership in the Scheme.
- I understand that once my Australian Superannuation savings have been transferred to a New Zealand KiwiSaver Scheme, it will become (with a few exceptions) subject to the rules and regulation governing the New Zealand KiwiSaver Scheme.

STATUTORY DECLARATION

I _____
(Full name)

Of _____
(Address and Occupation)

Do solemnly and sincerely declare that:

I have permanently emigrated from Australia to New Zealand and have no intention of returning to live in Australia permanently

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

Signature of the person making the declaration _____

Declared at _____ this _____ day of _____ 20 _____

Before me (JP, Solicitor, notary public, or person authorised to take a statutory declaration):

(Full Name) (Signature)

(Address) (Occupation)