



Craigs KiwiSaver Scheme

Withdrawal Request - Court Order

WHERE TO SEND YOUR COMPLETED WITHDRAWAL FORM

Please either deliver your completed withdrawal form to the nearest Craigs Investment Partners branch, or post it to:

Craigs KiwiSaver Scheme
Craigs Investment Partners Limited,
Freepost 366, PO Box 13155,
Tauranga 3141.

Phone: 0800 878 278
Email: clientservices@craigsip.com

Certified Copy

All identity documents must be certified by either a Justice of the Peace, a Lawyer, a Notary Public, a New Zealand Chartered Accountant, a New Zealand Police Constable or a Member of Parliament.

Certified documents must include the full name, occupation and an original signature of the certifier and the date of certification. Certification must have been carried out in the three months preceding presentation of the certified documents. The certifier must sight the original documents and make a statement that the documents provided are a true copy.

Alternatively, documents can be verified by your Craigs Investment Partners Adviser.

- A **certified copy** of the Court Order must be provided
- Funds will be paid to a Solicitors Trust Account or to the bank account of a KiwiSaver Scheme provider.

If New Zealand has not been your principal place of residence during your KiwiSaver membership then you will not be entitled to the Government Contributions for the period you have been a non-resident.

Form Checklist



Please check that you have provided the following:

- This form with all sections completed, including the statutory declaration;
- A **certified copy** of the court order; and
- If funds are to be paid to a Solicitors Trust account please provide a pre printed deposit slip, a bank statement or a certified verification of their bank account.

A Your Details

Scheme Account Number

Title *please select one*

 Mr Mrs Miss Ms Dr Other

Full Name *first, middle and last name*

Mailing Address

 Post code **Contact Phone** **Email** **Date of Birth** **IRD Number**

B Withdrawal Request

- **Full withdrawal**
- **Partial withdrawal*** *state ordered amount* \$

* Funds will be deducted proportionally from all holdings unless otherwise specified

CLIENT ACCOUNT NO.

INVESTMENT ADVISER

craigsip.com



5. My Craigs KiwiSaver Scheme does not contain any funds that were transferred either directly or indirectly (including via another New Zealand Superannuation or KiwiSaver Scheme) from a UK registered pension scheme.
6. I understand that the information supplied in this withdrawal request will be used to process my redemption and will be held by Craigs Investment Partners Superannuation Management Limited (and any companies in its group). I consent to my personal information being disclosed to my Investment Adviser, and administrator, auditor, tax adviser, the supervisor, custodian, adviser or agent, and the IRD or third parties as required to process my redemption or in accordance with the law. I agree that additional information may be sought from my solicitor. I understand that I may request to see, and if necessary, request the correction of my personal information.
7. I understand that where my principal place of residence has not been in New Zealand, I am not entitled to the Government Contributions during that period and these will be returned to Inland Revenue.

Please tick the statement that applies:

During my entire KiwiSaver membership, my principal place of residence was New Zealand.

OR

During my KiwiSaver membership, for a period of time I was living/working outside New Zealand.

I was a government employee who was serving outside of New Zealand for the below period. **Provide evidence with this withdrawal form and specify the dates below.**



I was working as a volunteer, or for a token payment, for a charitable organisation which is named and meets the requirements set out in the Student Loan Schemes Act 1992.

Provide proof that your voluntary work was one of the following reasons and specify the dates below:



- To relieve poverty, hunger, sickness or the ravages of war or a natural disaster; **or**
- To improve the economy of a country that is listed on the Organisation for Economic Co-operation and Development's list of countries receiving development assistance; **or**
- To raise the education standards of a country that is listed on the Organisation for Economic Co-operation and Development's list of countries receiving development assistance.

Other _____

Please specify below the period you were living/working outside New Zealand:

Period from | D | D | M | M | Y | Y | Y | Y | To | D | D | M | M | Y | Y | Y | Y |

Period from | D | D | M | M | Y | Y | Y | Y | To | D | D | M | M | Y | Y | Y | Y |

Period from | D | D | M | M | Y | Y | Y | Y | To | D | D | M | M | Y | Y | Y | Y |

I confirm that for all other periods my principal place of residence was in New Zealand.

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

Signature

Declared at *location*

On | D | D | M | M | Y | Y | Y | Y |

Continued on next page.

Before me please print your name and occupation, being a person authorised to take a statutory declaration under the Oaths and Declarations Act 1957

Name

Occupation

Signature

_____ Date | D | D | | M | M | | Y | Y | Y | Y |