

Lifestages KiwiSaver Scheme

Guide to proof of guardianship

Use this guide to determine the documentation required when enrolling a minor in the Lifestages KiwiSaver Scheme.

If you require assistance completing this form then please contact us **0800 727 2265** or email us at **contact@lifestages.co.nz**.

| Age | Required authorisation | Proof of guardianship / CYPFA Guardianship' (certified or verified as a true copy) | Identification and proof of residential address (certified or verified as a true copy) |
|-------------|--|--|--|
| 15 or under | All guardian(s) OR One CYPFA Guardian | <p>Guardian</p> <p>Any one (or more) of the following documents to confirm who the minor's legal guardians are:</p> <ul style="list-style-type: none"> • minor's full birth certificate • a Guardianship Order issued by a New Zealand Court appointing that person as a guardian • an Additional Guardian Appointment Form approved by the Registrar of a New Zealand Family Court appointing that person as a guardian • the minor's parent's will, appointing the person (who must be 20 years or older) as a testamentary guardian, together with the parent's death certificate. (A court order is also required if the parent was not a guardian at the time of death). <p>CYPFA Guardian</p> <ul style="list-style-type: none"> • A Court Order under section 110(a) to (d) of the Oranga Tamariki Act 1989 appointing the person as the minor's CYPFA Guardian. • The death certificate of the previous sole CYPFA Guardian if the CYPFA Guardianship is placed in an iwi, or cultural social service, or chief executive of the Ministry of Social Development, under section 119 of the Oranga Tamariki Act 1989. <p>* A court order removing the minor's guardians or death certificates evidencing the death of the minor's guardians.</p> <p>** Marriage certificate, civil union certificate, Family court approval or written confirmation from the minor's guardian confirming that they are in a de facto relationship.</p> | <p>All guardians as required in the authorisation column to the left, or if a CYPFA Guardian is acting, the CYPFA Guardian.</p> <p>And</p> <p>the minor (full birth certificate).</p> <p><i>Check the identity requirements on the next page for acceptable forms of identification and address verification.</i></p> |
| 16 or 17 | The minor and one guardian OR The minor and one CYPFA Guardian OR The minor alone if either no guardians* or the minor is in an evidenced marriage, civil union or de-facto relationship** | <p>* A court order removing the minor's guardians or death certificates evidencing the death of the minor's guardians.</p> <p>** Marriage certificate, civil union certificate, Family court approval or written confirmation from the minor's guardian confirming that they are in a de facto relationship.</p> | |

¹ CYPFA refers to 'Oranga Tamariki Act 1989'.

Identification details

(The enrolment application must be submitted with one of the identity options below for each guardian or CYPFA guardian as determined in the Guide to proof of guardianship above and the full birth certificate of the minor).

Present the following documents in person to an SBS Bank or FANZ staff member, or your authorised financial adviser. Where presentation of original documents is not possible, please provide certified copies of original documents by a Trusted Referee.

Option one (please tick one)

- New Zealand passport
 New Zealand Firearms Licence
 Overseas passport* (with photo and signed)

One of the above is required in conjunction with address verification, as follows:

- > Utility Bill (phone, power, gas)
- > Local Authority Rates Bill
- > Insurance Policy (Dwelling)
- > IRD Tax Notice/Certificate
- > NZ Bank Statement (not issued by SBS)
- > NZ Government authority issued documentation
- > Local Council Notification
- > Sale & Purchase Agreement

(The address verification from above must be issued within the last 12 months).

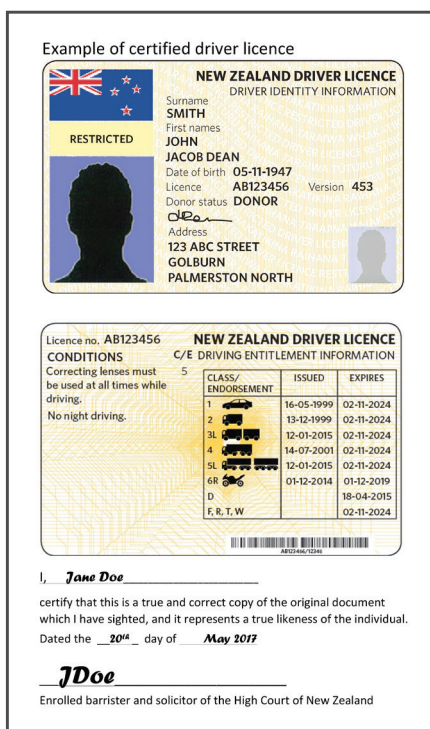
* If you are supplying foreign identity documents you must also supply proof of New Zealand residency.

Option two (please tick)

- Current Drivers Licence – along with one of the following
- > NZ Bank Statement (excluding SBS) issued within the last 12 months
 - > NZ Bank Embossed Card (excluding SBS) – signed
 - > Document issued by NZ Government (e.g. marriage licence)
 - > NZ or Overseas Birth Certificate*
 - > SuperGold Card
 - > Statement issued by NZ Government agency (e.g. WINZ, IRD) within the last 12 months

Along with one form of **address verification** from above and again issued within the last 12 months.

* If you are supplying foreign identity documents you must also supply proof of New Zealand residency.



All documents can be verified by an SBS Bank or FANZ staff member, or an Authorised Financial Adviser. If you are unable to present original documents, then certified copies of original documents may be presented. Copies of original documents must be certified by a Trusted Referee, namely one of the following:

- > a New Zealand Lawyer
- > a Notary Public
- > a Justice of the Peace
- > a New Zealand Chartered Accountant
- > Honorary Consul (New Zealand)
- > a person who has the legal authority to take statutory declarations or the equivalent in New Zealand.

In addition, the trusted referee must be over 16 years of age and must not be any of the following:

- > related to the customer; for example, a trusted referee cannot be their parent, child, brother, sister, aunt, uncle or cousin
- > the spouse or partner of the customer
- > a person who lives at the same address as the customer
- > a person involved in the transaction or business requiring the certification.

The trusted referee must sight the original document and provide a written statement to the effect that the copy provided is a true and correct copy and represents your identity. Certification must include the name, occupation, signature of the trusted referee and the date of certification.