

# Lifestages KiwiSaver Scheme Australian superannuation to KiwiSaver transfer application form

Please provide this letter to your Australian complying superannuation fund provider along with a completed transfer form and required documentation.

**Dear Australian complying superannuation fund provider**

## Trans-Tasman retirement savings portability

Please find enclosed a transfer application form and New Zealand statutory declaration that Funds Administration New Zealand Limited ('FANZ') has prepared to help our Lifestages KiwiSaver Scheme members apply to bring their Australian retirement savings to New Zealand. FANZ is the issuer and manager of the Lifestages KiwiSaver Scheme and accepts withdrawals transferred from an Australian complying superannuation fund, provided all the requirements are met.

To implement the trans-Tasman retirement savings portability initiative, the Australian Government has passed the Superannuation Industry (Supervision) Amendment Regulation 2013 (No.3). This Regulation amends the Superannuation Industry (Supervision) Regulations 1994 (SIS Regulations) by inserting a new Part 12A into the SIS Regulations with effect from 1 July 2013.

Under Part 12A, Division 3 of the SIS Regulations, the trustee of a complying superannuation fund must, subject to limited exceptions, pay the whole of a member's withdrawal benefit to a KiwiSaver scheme within 30 days, when the trustee is satisfied that the matters listed in sub regulation 12(A) 10.3 of the SIS Regulations have been met.

The Australian Government has subsequently passed the Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014. This regulation amends regulation 12A.10 so that statutory declarations made under New Zealand law satisfy the provisions.

The enclosed form (incorporating the New Zealand statutory declaration) has been developed to provide all necessary information for a trustee to make a payment to a KiwiSaver scheme in accordance with Part 12A, Division 3 of the SIS Regulations, and the Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014.

Please review the attached transfer application form and supporting evidence for our respective member.

Yours sincerely



**Graham Duston**

Funds Administration New Zealand Limited,  
Manager of the Lifestages KiwiSaver Scheme

# Lifestages KiwiSaver Scheme Australian superannuation to KiwiSaver transfer application form

Use this form to help you apply for a transfer of your Australian complying superannuation fund to your Lifestages KiwiSaver account.

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

## **IMPORTANT CHECKLIST** (RETURN WITH FORM)

**Before sending this form to your Australian complying superannuation fund provider:**

(Please tick)

- You are fully aware of the requirements you must meet in order to qualify for this transfer;
- Have completed all sections of this form including the statutory declaration (section 6);
- Attach a certified copy of evidence of New Zealand address (for a full list of acceptable documents, please refer to section 5 of this form), and
- Attach a certified copy of acceptable identity verification documents. This is usually by way of either a certified copy of a New Zealand passport or a certified copy of a New Zealand photo driver's licence together with a secondary form of identification (for a full list of acceptable documents, please refer to section 5 of this form);
- Attach the latest copy of your Australian complying superannuation fund statement

## **Things you need to consider when transferring your superannuation:**

When you transfer your super, your entitlement under that fund will cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your Australian complying super fund must give it to you. Some of the points you may consider are:

- **Fees – your transferring fund must give you information about any exit or withdrawal fees.**  
If you are not aware of the fees that may apply, you should contact your fund for further information before completing this application form. The fees could include administration fees as well as exit or withdrawal fees. Your receiving fund may also charge entry or deposit fees on transfer. Differences in the fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your transferring fund may insure you against death, illness or an accident that leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. The Lifestages KiwiSaver scheme does not provide insurance of its members, and you will therefore need to seek any insurance you need separately.
- **Tax** – the tax treatment of Australian superannuation schemes and KiwiSaver schemes are different. The ways in which your savings are taxed, and the applicable rates, are different.

### Section 1: Member's details

KiwiSaver member number **K S** | DoB **DD | MM | YYYY** | IRD number |

Title | Given name(s) | Surname |

Current New Zealand postal address |

| Postcode |

Home phone | Work phone | Mobile |

Best time to contact you (please tick one)  Morning  Afternoon  Evening

Email address |

### Section 2: Your Australian complying superannuation fund details

Australian fund name | Australian fund membership number |

Last known address in Australia |

| Postcode |

Date of permanent emigration to New Zealand Date **DD | MM | YYYY**

### Section 3: KiwiSaver scheme details

#### Contact details

KiwiSaver scheme name	<b>Lifestages KiwiSaver Scheme</b>
KiwiSaver scheme registration number	<b>KSS10028</b>
KiwiSaver provider name	<b>Funds Administration New Zealand Limited</b>
KiwiSaver provider postal address	<b>PO Box 5520, Wellington 6140, New Zealand</b>
KiwiSaver provider email address	<b>contact@lifestages.co.nz</b>
KiwiSaver provider contact number	<b>+64 3 211 0700</b>

#### Payment details

Bank SWIFT	<b>BKNZ22</b>
Bank name and address	<b>Bank of New Zealand 38 Wills Street, Wellington, New Zealand</b>
Beneficiary name	<b>T.E.A. Custodians o/a Lifestages</b>
Beneficiary address	<b>PO Box 409 Wellington 6140</b>
Beneficiary account number	<b>02 0500 0658976 20</b>
Remittance instructions	<b>Member's name and KiwiSaver member number</b>
Alternatively, please make your cheque payable to	<b>Lifestages KiwiSaver Scheme</b>
	Please include the member's name and KiwiSaver scheme investor number with the cheque.

### Section 4: Confirmation of acceptance

Funds Administration New Zealand Limited ('FANZ'), will accept the withdrawal amount from your Australian complying superannuation fund.

## Section 5: Identification details (Your transfer request must be submitted with one of the identity options below)

Please provide certified copies of original documents of the required documents from either option one or option two below. Please note an SBS staff member cannot certify documents.

### 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.



### 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.

## Section 6: Statutory declaration

### Dear Australian complying superannuation fund provider

The Superannuation Laws Amendment (2014 Measures No. 1) Regulation 2014 was passed on 21 August 2014, allowing Australian superannuation funds to accept a New Zealand statutory declaration as evidence that an individual has permanently emigrated to New Zealand. Funds Administration New Zealand Limited has prepared the following New Zealand statutory declaration to help our KiwiSaver members apply to bring their Australian retirement savings to New Zealand.

If you have any questions please contact us at [contact@lifestages.co.nz](mailto:contact@lifestages.co.nz).

I (full name)

Of (address)

Occupation

#### solemnly and sincerely declare and agree that:

1. I am a member of the Lifestages KiwiSaver Scheme.
2. I emigrated permanently to New Zealand as noted in section 2 of this form.
3. My current place of residence in New Zealand is the address noted in section 1 of this form.
4. I request and consent to a full withdrawal from my Australian complying superannuation fund detailed in section 2 of this form, to be paid to my Lifestages KiwiSaver Scheme account.
5. I discharge the trustee of my Australian complying superannuation fund of all further liability in respect of the benefits paid and transferred to my Lifestages KiwiSaver Scheme account.
6. I understand that the withdrawal amount from my Australian complying superannuation fund will be paid in Australian dollars and that the exchange rate between Australian and New Zealand dollars at the time my Australian savings are converted will affect the amount that is credited to my Lifestages KiwiSaver Scheme account.
7. I am aware I can ask my Australian complying superannuation fund for information about any fees or charges that may apply, or any other information about the effect of this transfer.

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

Applicant's signature

Declared at  Date

Before  Occupation/capacity

Signature of person taking the declaration

Note: SBS staff cannot take statutory declarations. A solicitor, Justice of the Peace or Registrar of a New Zealand Court can take this statutory declaration for you.

### Return form

Post this form and supporting evidence to the trustee of your Australian complying superannuation fund.  
You may need to visit your Australian provider's website to find their contact details.