

Retirement Withdrawal Form



You become eligible to make a retirement withdrawal from your KiwiSaver account when you turn 65. If you joined KiwiSaver prior to 1 June 2019 and have not been a member of KiwiSaver for 5 years, once you make a retirement withdrawal you will no longer be eligible for any future government contributions and your employer will no longer be required to make employer contributions.

Your completed withdrawal form and all supporting documents can be sent to your Financial Adviser or to Booster.

Please note that your withdrawal can take up to 30 days to process from the date we receive your completed form and documents.

If you have previously made a retirement withdrawal from your Booster KiwiSaver Scheme account and you are using the same bank account, please complete this form, sign and provide proof of your bank account, but you do not need to have your statutory declaration witnessed or provide proof of identity and address again.

To contact Booster, please email: kiwisaver@booster.co.nz, or call 0800 336 338.

1. Documents

Please provide the following documents with your completed form.

Proof of identity

You will need to provide certified or verified proof of your identity if you have not previously provided it to Booster. Not sure if you already have? Call 0800 336 338 to check.

Please take the original(s) and clear photocopies of your identity document(s) with you when you have your statutory declaration witnessed, or have them certified at a separate time by another person from the list below.

Option 1: choose one document

- NZ Passport
- Overseas passport, with a copy of NZ visa or letter from Immigration NZ
- NZ Firearms licence

Option 2: choose one document

- NZ driver's licence
- PLUS one of the following:**
- Bank statement dated in the last 12 months
- Credit, debit or eftpos card (front and back, must be signed)
- Super Gold card (with name and signature)
- A statement from a government agency (e.g. IRD) dated in the last 12 months

Option 3: choose one document

- NZ birth certificate
- NZ certificate of citizenship
- Overseas birth certificate
- PLUS one of the following:**
- NZ drivers licence
- Kiwi Access card
- International drivers licence

Persons able to certify documents

- Chartered accountant
- Registered medical doctor
- Registered teacher
- Kaumatua
- Member of the Police
- An NZ Honorary Consul
- Minister of Religion
- A person who has legal authority to take statutory declarations in New Zealand

Persons able to certify documents and witness statutory declarations

- Lawyer
- Justice of the Peace
- Notary Public
- Member of Parliament

A certifier cannot be related to you (e.g. be your parent, child, brother, sister, uncle, aunt, cousin), be your spouse or partner, live at the same address as you, or certify their own documents.

Proof of address

Select ONE option from this section

Must be dated within the last 6 months and show your current residential address

- Utility letter
- Government agency statement (e.g IRD)
- Bank account statement
- A printout from a bank, confirming name and address, stamped by the bank
- Rates bill

Proof of bank account

- A bank statement or screenshot of internet banking, confirming the bank account you want your withdrawal paid into.

Note: Payment can only be made into a New Zealand bank account as we do not make third party or foreign currency payments.

2. Your details

Member number (if known)

IRD number

Date of birth

Day

Month

Year

First name(s)

Middle name(s)

Last name

Address

Postcode

Phone number

Email

Prescribed Investor Rate (PIR)

10.5%

17.5%

28%

**If the PIR differs from what we currently have on record, it will be updated based on the new information provided.*

3. Type of withdrawal

Partial withdrawal of some funds Amount: \$

Regular withdrawal of Amount: \$

Frequency (please delete those not required): Fortnightly / Monthly / Quarterly / Annually

Start date:

Day

Month

Year

End date:

Day

Month

Year

Full withdrawal of all funds, and account closure

Note: unless you have requested a full withdrawal, your withdrawal will be deducted proportionally from each investment fund that you have invested in. If your KiwiSaver account balance falls below \$1,000.00 (taking into account any tax liability owed), then a full withdrawal will be processed and your KiwiSaver account will be closed.

4. Bank account details

Please note we can only pay to New Zealand bank accounts.

Name of account holder (e.g. John Smith):

Bank account number:

Bank

Branch

Account number

Suffix

5. Statutory declaration

Before allowing the withdrawal of government contributions, we need to ascertain whether you lived overseas while a KiwiSaver member. You are not eligible for government contributions for periods you lived overseas unless you worked for the New Zealand Government or an approved charitable organisation.

Please note it is an offence to give any altered, false, incomplete, or misleading information, or to make a false statement or declaration. Any person who does so is liable for imprisonment for up to three years.

This declaration must be completed and signed in front of a Justice of the Peace, solicitor, notary public, or other person authorised to take a statutory declaration.

If you joined KiwiSaver after you turned 65 or if you have made an earlier retirement withdrawal and are changing the bank account you want your withdrawal paid to, you are not required to have your declaration witnessed – please simply complete your details and sign.

I, (full name of member making the declaration)

Of (residential address)

Postcode

And (occupation) – if retired please write this – this box cannot be left blank

Continued on the next page

Do solemnly and sincerely declare that:

- i. I acknowledge that on receipt of the withdrawal I have requested above, my KiwiSaver account will be reduced by the amount I have partially elected to withdraw, or if I have elected a full withdrawal, my KiwiSaver account will be closed.
- ii. I will have no further claims against the Booster KiwiSaver Scheme in respect of the withdrawal(s) paid.
- iii. During the time I have been a member of KiwiSaver, I (tick one):

Have had my principal place of residence in New Zealand for the entire time

Was living overseas for the following periods:

to
Day Month Year Day Month Year

to
Day Month Year Day Month Year

to
Day Month Year Day Month Year

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

Signature of the member making the declaration

Declared at (place) Date

Before me (the person in front of whom the declaration is made)

Full name

Capacity (Justice of the Peace, Solicitor, or other person authorised to take the statutory declarations)

Address of the person taking the declaration

Postcode

Signature of the person taking the declaration

Stamp

What happens next?

Send your form and documents to your adviser, or to by post to **Booster Investment Management Limited, PO Box 11872, Wellington 6142**, or by email to **kiwisaver@booster.co.nz**. Once we've received it, a member of the Administration team will review it and contact you within 1 - 2 business days. If we need any other information or documents, we'll let you know at this time.

Have any questions? Give us a call on **0800 336 338**.