

Transfer of UK Pension Funds to a QROPS Scheme Form

Use this form if you currently have UK pension funds in your Booster KiwiSaver account and wish to transfer them to New Zealand-qualifying recognised overseas pension scheme (QROPS).

If the UK pension funds were invested in your Booster KiwiSaver account (either directly from a UK pension scheme or indirectly from another KiwiSaver scheme, QROPS or other foreign superannuation scheme recognised as a QROPS) **before** 17 June 2015, you can transfer those funds, together with the investment earnings on those funds, to a NZ QROPS.

The amount transferred will be the original amount plus or minus investment gains/losses (net of fees and taxes) less any withdrawals from your KiwiSaver account as these are treated as coming from UK pension money first. If we have received incomplete information about the investment gains/losses of the UK funds from a previous provider, we will transfer the UK related amount we are able to ascertain.

We will require confirmation from the receiving Scheme that they are a QROPS and they will accept the funds.

Checklist

Please complete the checklist below to make sure that you have provided us with the information and relevant documents we need to process your withdrawal application.

- ☐ **Completed Transfer form.**
- ☐ **Confirmation from receiving scheme of their QROPS status and confirmation they will accept the funds.**
If you are transferring funds to your Booster SuperScheme account, we can arrange for these confirmations.
- ☐ **Verification of Identity.** Please attach ID verification as per the Guidance Notes on this withdrawal form.

What happens next?

Send your form and documents to your adviser, or to by post to **Booster Investment Management Limited, Freepost 224954, PO Box 11872, Wellington 6142**, or by email to kiwisaver@booster.co.nz.

Once we've received it, a member of the Booster team will review it and contact you within 2 business days. If we need any other information or documents, we'll let you know at this time.

How long will it take?

From the date we have received your completed form (including all the required supporting documentation), we aim to transfer the funds within 10 working days.

We're here to help

If you have any questions, please talk to your Financial Adviser or call the Booster team, on **0800 336 338**.

1. Personal details

Member number

IRD number

Date of birth

First name(s)

Middle name(s)

Last name(s)

Address

Postcode

Phone number

Email

Prescribed Investor Rate (PIR) ☐ 10.5% ☐ 17.5% ☐ 28%

To work out your PIR, refer to the guide at booster.co.nz/pir or talk to your financial adviser.

2. Transfer instructions

I would like to transfer my savings to another superannuation scheme.

Name of Scheme

3. Members declaration

1. I am applying to the Manager of Booster KiwiSaver Scheme (Scheme), to transfer my UK Pension money held within my Booster KiwiSaver account.
2. The information that I have provided in this application (and any attached documents) is true and correct.
3. I acknowledge that Booster may be required to report my withdrawal to His Majesty's Revenue and Customs (HMRC) and that withdrawing funds transferred from a UK Pension Scheme may render me liable for HMRC tax charges, which may be up to 55% of the withdrawal or transfer amount. I understand that the imposition of these tax charges depends on the application of the complex rules applying to UK Pension Schemes and that I have had the opportunity to take professional advice.
4. I have had the opportunity to obtain financial advice regarding this application, from an appropriately qualified adviser.
5. I understand that Booster may request additional information from me relating to this application and Booster may approve or decline this application at its discretion until such time as I have met the transfer criteria and have provided all of the necessary information.
6. I understand that if this application is approved and a full withdrawal of my savings is made, fees may apply, any tax on investment income will be calculated and debited (where appropriate) at my recorded PIR and my membership of the Scheme will end.
7. I understand that the amount transferred will be based on the unit price(s) at the date the transfer request is processed, and that unit price(s) may change daily. The remaining balance (or the withdrawal amount if the full balance is being withdrawn) can be affected by changes to unit prices, and the transfer amount can be affected by any additional deductions or contributions.
8. I indemnify Booster and the Supervisor against all claims, actions, demands, proceedings, costs or expenses, damages or liability arising and discharge them from any liability in respect of a) any false or incomplete information given in this form; and b) my membership of the Scheme and/or any withdrawal payment made.
9. I have read and understood the Booster Privacy Policy: booster.co.nz/privacy-policy

I left the UK as a UK resident on the following date:

Member's signature

Date

Guide to verification and certification of identity documents

What identification do I need to provide?

You will need to provide proof of name, date of birth and residential address.

Please ensure that you provide us with the identification from the options in the table below. All forms of identity must be current (i.e., not expired), otherwise your application won't be able to be processed. You will need to provide:

- ☐ proof of identity; and
- ☐ proof of residential address; and
- ☐ have the documents either certified by an 'AML Trusted Referee' or verified by an authorised agent of Booster.

Option 1

One form of the following primary photographic identification:

- New Zealand passport
- New Zealand firearms licence
- Passport issued by a foreign government (including the New Zealand visa and signature of the person)

Option 2

One form of the following primary non photographic identification:

- New Zealand full birth certificate
- Certificate of New Zealand citizenship
- Birth certificate issued by a foreign government, the United Nations or an agency of the United Nations

Plus one form of the following secondary or supporting form of photographic identification:

- New Zealand driver licence (that includes the person's name, signature, and expiry date)
- Kiwi Access Card (previously known as 18+ Card)
- Valid International driving permit (that includes the person's name, signature and expiry date)

Option 3

A New Zealand driver licence (that includes the person's name, signature and expiry date)

Plus one of the following:

- Credit, debit or eftpos card, that includes the person's name and signature (any numbers on the front and back of the card should be redacted)
- A bank statement issued to the person that is not more than 12 months old issued by a registered bank
- Super Gold Card (that includes the person's name and signature)
- A statement from a government department issued to the person that is not more than 12 months old

Proof of Residential Address

Provide a copy of one of the following, issued and dated within the last 6 months, showing your current residential address:

- Utility letter
- Rates bill
- Bank account statement
- Government agency statement (e.g. Inland Revenue)
- a printout from www.whitepages.co.nz
- a print out from a bank confirming name and address (stamped by the bank).

Verification of identity documents

All copies of identification must be current and either certified by an 'AML Trusted Referee' or verified by an authorised agent of Booster (i.e. your financial adviser). These copies must be legible and all photos must be clear. *Certification is valid for three months.*

The certifier/verifier must sign and date the copy and print their name, occupation and a statement as follows:
"I [certify/verify] that this is a true copy of the original document sighted by me today and represents the identity of the named individual".

Persons able to witness statutory declarations and certify documents	Persons able to certify documents	
<ul style="list-style-type: none">LawyerJustice of the PeaceNotary PublicMember of Parliament	<ul style="list-style-type: none">Chartered AccountantRegistered medical doctorRegistered teacherKaumatuaMember of the Police	<ul style="list-style-type: none">An NZ Honorary ConsulMinister of ReligionA person who has legal authority to take statutory declarations in New Zealand

A certifier cannot:

- be related to you (e.g. be your parent, child, brother, sister, uncle, aunty, cousin)
- be your spouse or partner
- live at the same address as you
- certify their own documents