

Death of a Member Form

USING THIS FORM

This form should be used by a personal representative or a lawyer acting on behalf of a deceased Booster KiwiSaver Scheme member in the following circumstances:

- the Deceased Person left a Will; the person who has been granted Probate should complete this form in this situation; or
- where the Deceased Person did not leave a Will, the form will be completed by the person(s) who has been granted Letters of Administration; or
- Balances under \$15,000 (where applicable) (see below).

Balances under \$15,000 – section 65 of the Administration Act 1969

Where Probate/Letters of Administration are not required to be applied for and the value of the amount available for withdrawal is less than \$15,000, the following persons may be entitled to complete this form:

- a wife, husband, civil union partner or a child of the Deceased Person;
- a de facto partner;
- a person beneficially entitled to the estate under the Will or intestacy;
- a person appearing to be entitled to obtain administration of estate in New Zealand;
- a person related by blood, marriage or civil union to the deceased who undertakes to maintain the children of the Deceased Person who are minors or any of them; or
- a person who has and is exercising the role of providing day -to-day care for any of the children of the Deceased Person who are minors.

1 Personal details of the deceased

The information in this form is being collected for the purpose of managing the Scheme account of the Deceased Person and it will be held by the Manager of the Scheme, Booster Investment Management Limited, and it may be disclosed to third parties to the extent that is it necessary to administer the Deceased Person's withdrawal from the Scheme.

Member Number

Title	First Name (s)
Surname	
Residential Address	
Postcode	

IRD Number

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

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

2 Details of personal representative

If there is more than one personal representative, please provide their name(s) on a separate piece of paper.

Name of Personal Representative

Title	First Name (s)
Surname	
Residential Address	
Postcode	
Home Phone	Work Phone
Mobile Phone	
Email	

Relationship to Deceased Person (please provide details (and evidence) of your relationship, for example husband, wife, child, civil union partner, de facto partner, guardianship and/or day-to-day care of the Deceased Person's children):

3 Bank details

Name of Bank Account:

Bank Name and Branch:

Account number

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bank	Branch	Account number										Suffix							

Note: Payment will only be made to New Zealand bank accounts. Please attach a bank encoded deposit slip or internet banking printout confirming the bank account the withdrawal is to be paid to.

4 Details of lawyer acting on behalf

If there is a solicitor you would like us to contact please provide a contact name and address.

Name of lawyer acting on behalf

Title	First Name (s)
Surname	
Name of Firm	
Business Address	
Postcode	
Work Phone	Mobile Phone
Email	

5 Statutory Declaration

Please note it is an offence to give any altered, false, or 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.

I (Full Name)

of (Insert Residential Address)

Do solemnly and sincerely declare that:

1. I am entitled to make this claim and that all the information provided in this form and in all included materials attached is true and correct.

2. I declare that to the best of my knowledge and belief, the deceased's principal place of resident since first joining a KiwiSaver scheme was:

New Zealand for the entire period that they were a member of KiwiSaver; or;

Overseas for the following periods (if required continue on a separate page).

<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	to	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	to	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
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<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	to	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>

3. I am applying as a personal representative because (please select the option that applies to you):

- c. I am entitled to apply for the proceeds under section 65 of the Administration Act 1969, and
 - i. the deceased left a Will, and Probate has not and will not be applied for and to the best of my knowledge probate has not been applied for, or obtained, in New Zealand.
or
 - ii. the deceased did not leave a Will, and Letters of Administration have not and will not be applied for, or obtained, in New Zealand.
 - iii. I am (delete all those which do not apply to you);
 - the widow, widower, surviving civil union partner, or child of the Deceased Person (please provide evidence).

- the surviving de facto partner of the Deceased Person.
- a person beneficially entitled to obtain administration of the estate of the Deceased Person in New Zealand because (please state the reason why).

- a person related by blood or marriage or civil union to the Deceased Person who undertakes to maintain the children of that person who are minors or any of them because (please provide details and evidence).

- a person who has and is exercising the role of providing day-to-day care for any of the children of the Deceased Person who are minors because (please provide details and evidence).

- 4. I apply for and consent to receive the payment of the Deceased Person's Booster KiwiSaver Scheme account;
- 5. I undertake that any money paid to me by the Supervisor of the Booster KiwiSaver Scheme pursuant to section 65 of the Administration Act 1969 (where applicable) will be applied in the due course of the administration of the estate of the Deceased Person;
- 6. I hereby agree to indemnify the Supervisor (Public Trust) and the Manager (Booster Investment Management Limited) of the Booster KiwiSaver Scheme against any claims, losses, damages, costs and/or expenses whatsoever which may arise in connection with the said investment or the payment of the balance therefore and also against all amounts the Supervisor and the Manager may be called upon to pay and all costs, charges and expenses incurred in connection therewith;

5 Statutory Declaration (continued)

- 7. I consent to the Supervisor and/or Manager of the Booster KiwiSaver Scheme contacting the solicitor acting for me to the extent that is it necessary to administer the Deceased Person's withdrawal from the Scheme;
- 8. I understand that by completing this form I will be providing personal information which will be held securely by the Supervisor and/or Manager of the Booster KiwiSaver Scheme. I have the right to access and correct this information subject to the provisions of the Privacy Act 1993;

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 Declarant (please sign below)

Declared at (location)

this day of 20

before me (full name)

Signature of a Solicitor, Justice of the Peace or other person authorised to take a statutory declaration (please sign below)

Please return the completed form and documents to your Adviser or;

**Booster Investment Management Limited
PO Box 11872
Wellington 6142**

or email kiwisaver@booster.co.nz

If you have any questions about completing this form please contact your Adviser.

Documents to be attached to this request

To enable us to process this withdrawal request, please ensure that the following documents are attached to your application.

- a certified copy of the Deceased Person's Death Certificate; and either
 - where the Deceased Person left a Will and Probate was obtained, a certified copy of the grant of Probate; or
 - where the Deceased Person did not leave a Will and if balance is over \$15,000, a certified copy of the Letters of Administration.
- evidence of your relationship to the Deceased Person, including guardianships or day-to-day care of the Deceased Person's child or children e.g. birth certificate/marriage certificate;
- a copy of a bank encoded deposit slip or internet banking printout confirming the bank account the withdrawal is to be paid to;
- Verification of Identity of each claimant or personal representative as per the Guidance Notes attached to this form.

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:

1. proof of identity; **and**
2. proof of residential address; **and**

have the documents either certified by an 'AML Trusted Referee' or verified by an authorised agent of Booster.

Proof of Identity

Option 1

One form of the following primary photographic identification:

- New Zealand passport (including the signature page)
- New Zealand firearms licence
- Passport issued by a foreign government (including the name, date of birth, photograph, New Zealand visa and signature of the person)

OR Option 2

One form of the following primary non photographic identification:

- New Zealand full birth certificate
- Certificate of New Zealand citizenship issued under the Citizenship Act 1977
- 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
- 18+ Card
- Valid International driving permit

OR Option 3

New Zealand driver licence

Plus one of the following:

- Credit, debit or eftpos card, that contains the person's name and signature
- A bank statement issued to the person that is not more than 3 months old issued by a registered bank
- Super Gold Card
- A statement from a government department issued to the person that is not more than 3 months old

Proof of Residential Address

Provide a verified/certified photocopy of one of the following, issued and dated within the last 3 months, showing your current residential address:

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

Verification of identity documents

All copies of identification must be either certified by an 'AML Trusted Referee' or verified by an authorised agent of Booster. Verified copies must be legible and all photos must be clear. Verification is valid for three months.

The certifier/verifier must view the original document and compare it with the copy. The certifier/verifier can then sign and date the copy and print their name, occupation and a statement as follows:

"I 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 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