Booster KiwiSaver Scheme



First Home Withdrawal Form

Please return the completed form and supporting documents to your Financial Adviser or to Booster.

Withdrawal to purchase a first home

Please complete this form if you would like to apply for a first home or previous home owner withdrawal.

You may be eligible to withdraw some of your KiwiSaver savings if you:

- have been a KiwiSaver member for at least three years; and
- have not made a home purchase withdrawal from KiwiSaver; and
- intend this withdrawal to be used to purchase your principal place of residence; and
- have not previously held an estate in land solely, jointly with another person, or as tenants in common, or you are eligible for a home purchase withdrawal as a previous home owner.

Your withdrawal application form and all supporting documentation must be completed and received by Booster Investment Management Limited (Booster) at least 10 business days before you require the funds to be paid to your solicitor or conveyancing practitioner.

This form is valid for 60 days from the date of the Statutory Declaration. You should check your eligibility for a withdrawal to purchase your first home with us or your Financial Adviser before completing this form.

Previous home owner withdrawal and KiwiSaver HomeStart grant

Contact Kāinga Ora on 0508 935 266 or visit www.kaingaora.govt.nz to find out if:

- you qualify as a previous homeowner and to obtain your eligibility letter; or
- you are eligible for a KiwiSaver HomeStart grant (which is administered by Kāinga Ora)

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.

	IRD number Date of birth
	Day Month Year
First name(s)	Middle name(s) Last name
Address	
	Postcode
Phone number	Email
Type of withdrawal (please ti	
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☐ I request a partial withdrawal of	from my Booster KiwiSaver Scheme account.
or	
I request a withdrawal of all avai	ole funds* from my Booster KiwiSaver Scheme account.
	00 as well as any amount transferred from an Australian complying superannuation schemaccount after making a first home or a previous home owner withdrawal.
How the withdrawal amount will be	pplied (please tick one)
 The funds withdrawn will be app applied towards the balance of t or 	ed (in the first instance) towards paying a deposit on the property (with any residue then a purchase price at settlement);
	ed solely towards paying the purchase price of the property at settlement.
The amount withdrawn will be ded	ted proportionally from each Investment Fund that you have invested in, and taken:
• firstly from your own and any e	ployer contributions (and your investment earnings), and
• secondly from your member to	credits amount.
After you have made the withdrawa contributing to the Scheme.	you will remain a member of the Booster KiwiSaver Scheme and you may continue
	nt for any tax owed on the amount being withdrawn by deducting it from the amount exprocessed by Booster and is subject to our approval. If you have any questions regarding act us on 0800 336 338 .
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5. Statutory declaration 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 Do solemnly and sincerely declare that: Booster may collect information provided by me. Any such information will be held by Booster and may be used by Booster to provide their services to me, including to advise me of their products and services and those of third parties. If I do not provide information when required, Booster will not be able to provide the information I want to access. Pursuant to the Privacy Act 2020 I have the right to access and correct my personal information held by Booster at any time; All information I have provided in this form is true and correct; I have never made a withdrawal from a KiwiSaver scheme (whether this Scheme or any scheme to which I previously belonged) for a home purchase; I have been a member of a KiwiSaver Scheme for three years or more; 4. The land or property I wish to purchase is an estate in land or an interest in a dwelling house on Māori land located in New Zealand and is or is intended to be my principal place of residence; I have never held an estate in land*, or I attach confirmation from Kāinga Ora that it is satisfied my financial position is what would be expected of a person who has never held an estate in land; *This is subject to limited exceptions (see clause 8(5) of the KiwiSaver Scheme Rules in the KiwiSaver Act 2006); I understand that should the information given be incomplete or incorrect, Booster will not be able to complete its assessment of my application without receiving the complete and correct information; I understand that my application for a first home or previous home owner withdrawal is subject to the approval of Booster and to Booster receiving: a. a pre-printed bank deposit slip for my solicitor's or conveyancing practitioner's trust account; and b. a certificate from my solicitor or conveyancing practitioner attaching a copy of the Sale and Purchase Agreement which clearly shows me as the purchaser and contains undertakings (in a form acceptable to Booster) relating to the status of that Agreement and the application of funds withdrawn; and c. for an interest in a dwelling house on Māori land, evidence of my right to occupy the Māori land. I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed and may fluctuate: 10. I understand that if the settlement (as set out in the attached Sales and Purchase Agreement) is not completed by the due date or any agreed extended date, that the funds will be repaid by my solicitor or conveyancing practitioner to Booster, as soon as practicable on my account with no deductions or disbursements having been made to the amount released to the solicitor or conveyancing practitioner; 11. I agree that Booster may obtain from my solicitor or conveyancing practitioner any additional information that it needs in order to process this application, and I hereby authorise my solicitor or conveyancing practitioner to give such further information. A photocopy of this authorisation shall be read as the original; and 12. I agree that one of the following applies: During my KiwiSaver membership period, there were no periods when my principal place of residence was not New Zealand. or During my KiwiSaver membership period, New Zealand has been my principal place of residence except during the periods set out below (please specify): Start date End date Day Month Month Year Day Year Start date End date Day Month Year Day Month Year Start date End date Dav Month Year Day Month Year Start date End date Day Month Year Day Month

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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 (that includes the person's name)
- 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. If this is not in English we will require an official translation)

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 and signature)
- Kiwi Access Card (previously known as 18+ Card)
- Valid International driving permit (that includes the person's name and signature)

Option 3

New Zealand driver licence (that includes the person's name and signature)

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 verified/certified photocopy of one of the following, issued and dated within the last 6 months, showing your current residential

- Utility letter
- Rates bill
- Bank account statement
- Government agency statement (e.g. Inland Revenue)
- a print out from www.whitepages.co.nz or 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). 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 [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 certify documents Persons able to certify documents and A certifier cannot: witness statutory declarations Chartered Accountant • be related to you (e.g. be your parent, Lawver child, brother, sister, uncle, aunty, cousin) · Registered medical doctor Justice of the Peace • be your spouse or partner Registered teacher Notary Public Kaumatua Member of Parliament • live at the same address as you • Member of the Police • certify their own documents • An NZ Honorary Consul • Minister of Religion • A person who has legal authority to take statutory declarations in New Zealand