

Living Super KiwiSaver scheme transfer out



About this form

This form tells us about the super you'd like to move from Living Super to a KiwiSaver Scheme.

Please return to:

Living Super
REPLY PAID 4307
SYDNEY NSW 2001

Good to know

To transfer your super to a KiwiSaver scheme you need to:

1. Have permanently emigrated to New Zealand
2. Provide proof of residence at a New Zealand address (Part D of this form)
3. Provide certified proof of your identity (Part E of this form)
4. Provide a Statutory Declaration stating that you have permanently emigrated to New Zealand (Part F of this form)
5. Ensure the KiwiSaver scheme is able to accept your Australian transfer

Note: If the KiwiSaver Scheme will not accept the transfer we will be unable to complete your request

Part A: Your details

Client number

Living Super account number

First name

Last name

Date of birth (DD/MM/YYYY)

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Inland Revenue Department number (IRD)

Part B: Your contact details

Address

Suburb

Town/City

Postcode

Phone

Part C: KiwiSaver details

I would like to transfer the whole balance of my Living Super account to KiwiSaver scheme:

KiwiSaver Scheme Name

KiwiSaver registration number

KiwiSaver account number

Phone

Address

Part D: Proof of residence

Please attach proof of your residence at a New Zealand address such as a copy of your licence, utility bill, lease, bank statement, or other documents that includes your name and also confirm your address.

I have attached proof of my residence at a New Zealand address.



Part E: Verifying your identity

To transfer the funds from your account you will need to attach your certified identification documentation.

To verify your identity follow the four simple steps below:

- Step 1** Choose either one identification document from list A or two documents from list B below
- Step 2** Select an authorised person to certify your documents
- Step 3** Take copies and originals to the certifier and ask them to complete the certification
- Step 4** Send the certified documents to Living Super GPO BOX 4307 SYDNEY NSW 2001

Step 1: Choose identification documents

You need to choose either one document from List A or two documents from List B. Please note the certified copies will not be returned.

NOTE: The documents must verify your Full Name AND either your Residential Address OR Date of Birth.

List A

- Australian Driver's Licence (must be current, show current residential address and photograph)
- Australian Passport (either a current passport or a passport that expired within the last 2 years)
- Proof of Age Card/NSW Photo Card (must be current and show date of birth and photograph)
- International Passport (current, containing a photograph and a signature and accompanied by a translation from a Professional Translator accredited by the National Accreditation Authority for Translators and Interpreters if not in English)

List B

One of the documents

- Birth Certificate (issued by a State or Territory in Australia)
OR
- Citizenship Certificate (issued by the Commonwealth of Australia)
OR
- Pension Card or Health Card (must be current and issued by Centrelink entitling financial benefits)
AND
- Social Security notice issued by the Commonwealth, State or Territory in the past 12 months containing your name and residential address which records financial benefits provided to you
OR
- Notice Issued by the Australian Tax Office within the past twelve months that contains your name and residential address and records debts payable by you
OR
- Rates or Utilities notice issued in the last 3 months containing your name and residential address and recording the provision of services to you/your address

Step 2: Select a certifier

Take the originals and copies of your identification documents to a document certifier from the list below. Ask them to follow the instructions in Step 3.

1. A Pharmacist
2. A Justice of the Peace
3. A Notary Public Officer
4. A Medical Practitioner or Nurse
5. A Police Officer
6. An Accountant (CA/CPA)
7. A Legal Practitioner
8. A Full-time teacher (school or tertiary)
9. Bank/Credit Union/Building Society Officer with at least two years continuous service
10. A permanent employee of a Commonwealth, State/Territory or local government with at least two years continuous service.

Step 3: Certifier instructions

Once you (the certifier) have sighted the original proof of identity document and the copy and confirmed that both documents are identical on each page of the copy complete the following:

1. Certify as true copies by writing or stamping "I hereby certify that these pages are a true copy of the original document shown to me on [date]"
2. Sign each document and print your Name, Address, Phone Number and Certifier Classification. For example; John Smith, 1 ABC Street, Sydney, NSW, 2000 ph: 1234 5678, Accountant



Part F: Statutory declaration

(1)

Full name (of person making the declaration)

I,
Address

Suburb

Town/city

Postcode

Occupation

make the following declaration under the Statutory Declarations Act 1959:

I hereby declare that I have permanently emigrated to New Zealand

I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under Section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this declaration are true in every particular.

(2)

Signature (of person making the declaration)

Declared at

in the state of

on this day of 20 before me,

(3)

Signature (of person before whom the declaration is made)

(4)

Full name (of person before whom the declaration is made)

Address

Suburb

Town/city

Postcode

Qualification

Note 1: A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years - see Section 11 of the Statutory Declaration Act 1959.

Note 2: Chapter 2 of the Criminal Code applies to all offenses against the Statutory Declarations Act 1959 - see section 5A of the Statutory Declarations Act 1959.



A statutory declaration under the Statutory Declarations Act 1959 as amended may be made only before:

- Architect
- Chiropractor
- Dentist
- Financial adviser or financial planner
- A person enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a Legal practitioner
- Medical practitioner
- Midwife
- Migration agent registered under Division 3 of Part 3 of the Migration Act 1958
- Nurse
- Occupational therapist
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trademarks attorney
- Veterinary surgeon
- Accountant who is a fellow of the National Tax Accountants' Association, a member of Chartered Accountants Australia and New Zealand, the Association of Taxation and Management Accountants, CPA Australia, or the Institute of Public Accountants
- Permanent employee with 5 or more years of continuous service or agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- APS employee engaged on an ongoing basis with 5 or more years of continuous service who is not specified in another item of this Part
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank, building society, credit union or finance company officer with 5 or more continuous years of service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Employee of a Commonwealth authority engaged on a permanent basis with 5 or more years of continuous service who is not specified in another item in this Part
- Employee of the Australian Trade and Investment Commission who is in a country or place outside Australia, authorised under paragraph 3(d) of the Consular Fees Act 1955 and exercising the employee's function at that place
- Employee of the Commonwealth who is at a place outside Australia, authorised under paragraph 3(c) of the Consular Fees Act 1955 and exercising the employee's function at that place
- Engineer who is a member of Engineers Australia (other than at the grade of student), a Registered Professional Engineer of Professionals Australia, registered as an engineer under a law of the Commonwealth, a State or Territory, or registered on the National Engineering Register by Engineers Australia
- Holder of a statutory office not specified in another item of this Part
- Judge
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of the Australian Defence Force who is an officer, a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 5 or more years of continuous service, or a warrant officer within the meaning of that Act
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Governance Institute of Australia Ltd
- Member of the Parliament of the Commonwealth, a State, a Territory legislature, or a local government authority
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public including a notary public (however described) exercising functions at a place outside the Commonwealth and the external Territories of the Commonwealth
- Permanent employee of a State or Territory, a State or Territory authority, or a local government authority with 5 or more years of continuous service, other than such an employee who is specified in another item of this Part
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar or Deputy Registrar of a court
- Senior executive employee of a Commonwealth authority or of a State or Territory
- SES employee of the Commonwealth
- Sheriff or Sheriff's officer
- Teacher employed on a permanent full time or part time basis at a school or tertiary education institution



Part G: Tax deduction notice

In relation to personal contributions made to your super account, please indicate whether you are;

- eligible and wish to claim a tax deduction
- not claiming a tax deduction

If you're eligible to claim a tax deduction please complete the online Notice of Intent to Claim a Tax Deduction Form located on the Living Super member portal before returning this form. If you have any questions about lodging the Notice of Intent to Claim a Tax Deduction Form online, please contact us on 133 464 8am-8pm Monday to Friday (Sydney time).

Note: If you do not submit a Notice of Intention to Claim a Tax Deduction or the Trustee does not accept the notice prior to your withdrawal, any personal contribution that forms part of the withdrawal will be treated as non-concessional contributions and you will not be able to claim a tax deduction in respect of the contribution.

Part H: Declaration and authority

By signing this form I am making the following statements:

- The information provided is true and correct.
- I am aware that I may ask the Trustee for information that I reasonably require for the purpose of understanding my benefit entitlements in Living Super including fees or charges that may apply to any withdrawal request and the effect of any withdrawal request on any entitlements (such as insurance cover) and I have either sought this information, or do not require such information.
- I authorise Living Super to pay my benefit as instructed on this form and understand and acknowledge the implications and the effects of this transaction.
- I discharge the Trustee from all further liability in respect of the benefits paid.
- If I have insurance cover, I understand that such cover will cease for any event on or after the date the full account balance is paid.
- I understand that the withdrawal proceeds will be calculated in accordance with the governing rules applicable to Living Super after all relevant information is received by Living Super.
- I have lodged all required 'Notice of intent to claim or vary a deduction for personal super contributions' forms with Living Super and I understand that I will not be able to claim further deductions or make amendments to prior deductions claimed once this KiwiSaver scheme transfer is processed.

Signature

Date (DD/MM/YYYY)

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For the curious: This information was prepared and sent on behalf of Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153, RSE L0000635, the Trustee of Living Super, a sub-plan of OneSuper ABN 43 905 581 638 (Fund) and the issuer of interests in the Fund. Living Super is a product issued out of the Fund. Insurance cover offered by the Fund is provided by MetLife Insurance Limited ABN 75 004 274 882 AFSL 238096. The information contained above is general advice only and has been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, the appropriateness of the product and read the Product Disclosure Statement and Target Market Determination available at ing.com.au before making any decision to acquire or continue to hold the product. You may also decide to seek independent financial advice before making a decision about the product. ING is a business name of ING Bank (Australia) Limited ABN 24 000 893 292, AFSL 229823

