

Subsequent Retirement Withdrawal

If you would like help in completing this form, please email kiwisaver@fisherfunds.co.nz or phone us on **0800 FF KIWI (0800 335 494)**.

You can complete this form on-screen by typing directly into each field. Once you have completed this form:

- If you have selected Option 1 as your preferred identification method and the value of your withdrawal is under \$50,000 you can email your completed application to **kiwisaver@fisherfunds.co.nz**
- If you have selected Option 2 as your preferred identification method you must post your application and supporting documents to **Fisher Funds Management Limited, Private Bag 93502, Takapuna, Auckland 0740** or send by courier to **Fisher Funds Management Limited, Crown Centre, 67-73 Hurstmere Road, Takapuna, Auckland 0622**.

Who should complete this form?

Please use this form if you have already made a retirement withdrawal from your Fisher Funds KiwiSaver Scheme or Fisher Funds TWO KiwiSaver Scheme account ("KiwiSaver account") and would like to apply for a subsequent withdrawal.

Section 1: Your Details

Title	First Name/s	
<input type="text"/>	<input type="text"/>	
Surname		
<input type="text"/>		
KiwiSaver Account No.	IRD 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"/>	
Prescribed Investor Rate (PIR) (please tick one)		
<input type="checkbox"/> 10.5%	<input type="checkbox"/> 17.5%	<input type="checkbox"/> 28%
To work out your PIR, or for more information, visit fisherfunds.co.nz/pircalculator or call us on 0508 347 437.		
If your selected PIR differs to the rate we have on file, the change will require 1 business day to update before your withdrawal can be processed. If you do not select a PIR, your withdrawal will be processed at the rate we hold on file for this account.		
Address		
<input type="text"/>		
City	Country	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Home Phone	Work Phone	Mobile
<input type="text"/> ()	<input type="text"/> ()	<input type="text"/> ()
Email Address		
<input type="text"/>		

Section 2: Identification Options

Your withdrawal request may need to be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

Option 1 – Electronic identity verification

Fisher Funds has the ability to electronically verify your identity and address. Once we have received your withdrawal request we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification you must have: a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following:

- » New Zealand Passport
- » New Zealand Drivers Licence
- » Australian Passport
- » Australian Drivers Licence

If this method of identification is unsuccessful you will be required to provide certified ID and proof of address.

Option 2 – Certified copies of identity documents and proof of residential address

Please provide a certified copy of your identity documents and proof of your residential address. Refer to Sections 3 and 4 for information on acceptable identity documents and who can certify them.

Preferred identification method — please select one of the following options:

☐

Option 1 – I would like Fisher Funds to electronically verify my identity

☐

Option 2 - I would like to provide Fisher Funds with certified copies of my identity documents

Section 3: Certified Identity Documents

If you selected Option 2 as your preferred way for us to verify your identity please select one of the certified identification options below. If you have selected Option 1 you do not need to provide certified ID now.

We are only able to accept original certified copies of certified ID (i.e. the copy that has been physically certified). These documents must be posted to us, our postal address is on page 1.

OPTION A: (preferred)

☐

Passport (containing name, date of birth, photograph and signature)

OR

☐

New Zealand Firearms Licence

OR

☐

New Zealand Driver Licence (front and back)

OPTION B:

☐

Full Birth Certificate

AND one of the following

☐

18+ Card/Kiwi Access Card

OR

☐

Overseas Drivers Licence

** If you are supplying foreign identity documents you must also supply proof of New Zealand residency to enable us to confirm your eligibility to join / have joined KiwiSaver.*

Your photo identification must be current (not expired). If you're unable to provide the above documentation please contact us to discuss other options.

A Fisher Funds representative can verify your identity documents if you visit our office.

How to have your ID correctly certified



I certify this to be a true copy of the original document and confirm it represents the identity of Joe Smith.

Name: Jane Doe

Occupation: Justice of the Peace

Date: 18/08/2020

Signature: [Signature]

Photocopy ID at 150%

So the details are legible.

Please do not send in your physical identity documents e.g. passport, driver's licence, birth certificate etc.

Please note: Certification is valid for three months and must have been carried out within three months of this application.

Your identity documents must be certified by one of the following people: Justice of the Peace, Registered Lawyer, Chartered Accountant, Registered Teacher, Registered Doctor, Police Officer, Notary Public, Registrar/Deputy Registrar.

Section 4: Proof of Address

If you have selected Option 2 as your preferred identification method please provide proof of your residential address as set out below. Your proof of address doesn't have to be certified. If you selected Option 1 you do not need to provide proof of address.

Current physical address

Can't be a PO Box number.

Mr Joe Smith
58 Green Street
Takapuna
AUCKLAND 1023
New Zealand

Statement of Accounts
Your Account(s) at a glance as at 19 XXXX 2020

Today's Statement(s)

Tertiary

Upcoming Automatic Payments

Dated in the last 12 months, an invoice, statement, letter or contract from:

- » utility provider e.g. water, power, phone
- » professionals e.g. accountant, doctor
- » service providers e.g. Sky TV, insurance
- » government e.g. IRD, WINZ, rates notice
- » current employer e.g. payslip
- » bank correspondence or statement
- » tenancy agreement

Please note: We cannot accept a statement/correspondence from Fisher Funds as proof of your address.

Section 5 Your Withdrawal Options

Partial Withdrawal

☐ Withdraw \$ (minimum withdrawal amount is \$500)

Regular Withdrawal

We require at least two business days to set up a regular withdrawal from receipt of this withdrawal request.

☐ Set up a regular withdrawal facility (minimum withdrawal amount is \$100 regardless of frequency)

Frequency

☐ Weekly

☐ Fortnightly

☐ Monthly

☐ Quarterly

☐ Annually

Start Date

/ /

*Please note this is the date your withdrawal will be priced, it will then be paid 3-5 working days after this date. Please bear this in mind if you want to receive the funds by a certain date.

Full Withdrawal

☐ Withdraw my full account balance and close my KiwiSaver account

Your final Government contribution claim will be processed by Inland Revenue before your withdrawal is actioned, so payment may take up to **10 working days** from receipt of this form.

If you are invested in more than one Fund we will withdraw an amount from each Fund in line with the proportion in which you are currently invested in each Fund. Alternatively, please contact us on 0800 FF KIWI (0800 335 494) to discuss how you would like your withdrawal deducted.

Transfer my Balance

If you would like to transfer your KiwiSaver account balance to another Fisher Funds investment please call us on 0800 FF KIWI (0800 335 494) to discuss the options available and how we can help you.

Section 6: Payment Details

☐ Use bank account details on file for this subsequent withdrawal

If you would like the payment to be made to a different bank account please complete the details below and provide proof of your bank account name and number by supplying any one of the following:

- a pre-coded deposit slip
- a copy of a cheque
- a copy of a bank statement
- an over-the-counter printed receipt with a tellers stamp
- an online bank account statement with the name of the bank in the header/footer

Name of Bank Account

Account Number

Bank

Branch

Account Number

Suffix

Name of Bank and Branch Address

We will only make payments in New Zealand dollars to a New Zealand bank account in your name (held individually or jointly). We will adjust your withdrawal amount for any tax liability.

Section 7: Declaration

I confirm that the information given in this form is correct. I am entitled to make this withdrawal request and I am applying to the Supervisor to withdraw some or all of my KiwiSaver account. If I have opted to withdraw all of my KiwiSaver account, I understand that on payment of my full account balance my account will be closed.

Your Signature

Date

/ /