

## Transfer to KiwiSaver scheme account

Use this form to request a transfer of your Aon Eligible Rollover Fund benefit to a KiwiSaver scheme account you have established in New Zealand. We recommend you seek financial and taxation advice before requesting this transfer.

If you have any questions, please call us on **1300 880 588** or email **contactaon@pillar.com.au**.

### IMPORTANT INFORMATION

You will need to:

- attach a document from the KiwiSaver scheme confirming that it will accept transfers from an Australian superannuation fund
- attach proof of your residential address in New Zealand eg utilities bill, bank statement, council rates, tenancy agreement
- complete the New Zealand statutory declaration on page 2 to confirm that you are a former resident of Australia and have emigrated permanently to New Zealand. Alternatively, you can complete a Commonwealth of Australia statutory declaration (see page 3)
- attach a 'certified' copy of photo ID eg passport details page or driver's licence (see *Proof of identity* on page 3).

### YOUR DETAILS

Member number









Title

Given names

Surname

Date of birth









Sex (M or F)

Telephone (including country and area code)











Email

Last residential address in Australia

Suburb/town

State




Postcode





Residential address in New Zealand

Suburb/town

Postcode





Your New Zealand IRD number

## KIWISAVER SCHEME DETAILS

KiwiSaver scheme name

Postal address

Suburb/town

Postcode

KiwiSaver scheme registration number

Your KiwiSaver scheme account number

### New Zealand

### STATUTORY DECLARATION

*Oaths and Declarations Act 1957*

1 Insert the name, New Zealand address  
(no P.O. box) and occupation of person  
making the declaration

I,<sup>1</sup> \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

make the following declaration under the *Oaths and Declarations Act 1957*:

- ⌵ I am a former resident of Australia.
- ⌵ I have emigrated permanently to New Zealand.
- ⌵ All supporting documents provided with this form are true and correct.
- ⌵ I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.
- ⌵ I understand that a person who deliberately provides false information in a statutory declaration could be charged with an offence and sentenced in court.

2 Signature of person making the  
declaration (**you must sign in front of  
an authorised witness – see next page**)

\_\_\_\_\_

3 Place  
4 Day  
5 Month and year

Declared at <sup>3</sup> \_\_\_\_\_ on <sup>4</sup> \_\_\_\_\_ of <sup>5</sup> \_\_\_\_\_

6 Signature of person before whom the  
declaration is made (see next page)

Before me, <sup>6</sup> \_\_\_\_\_

7 Full name, qualification and address of  
person before whom the declaration is  
made (in printed letters)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Who can witness a statutory declaration

### New Zealand declaration

You need to sign your New Zealand declaration in front of a person who is authorised to witness statutory declarations. This includes New Zealand Justices of the Peace, barristers, solicitors, and Notaries Public. A full list is set out in Section 9 of the New Zealand Oaths and Declarations Act 1957 at <http://www.legislation.govt.nz/act/public/1957/0088/latest/whole.html#DLM314584>.

### Commonwealth of Australia declaration

You may choose instead to complete a *Commonwealth of Australia statutory declaration* which is available at [erf.aon.com.au/erfmemform.htm](http://erf.aon.com.au/erfmemform.htm). You need to sign your declaration in front of a person who is authorised to witness Australian statutory declarations. This will differ depending on whether your declaration is being witnessed in Australia or in New Zealand. See the declaration for more information.

## Proof of identity

We are required under the rules of the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* to verify a member's identity when making a transfer.

### Identity documents

Your transfer form must be accompanied by a 'certified' copy of a photo ID (eg passport details page or driver's licence).

Please refer to the *Identification (ID) rules and certification of documents* factsheet at [erf.aon.com.au/erfmemform.htm](http://erf.aon.com.au/erfmemform.htm) for:

- documents you can use if you have no photo ID
- additional requirements:
  - name change
  - signing on behalf of the member.

### Certifying document copies

#### ➤ If you are in New Zealand

Only a 'trusted referee' can certify your document copies. People who can act as 'trustee referee' include a Justice of the Peace, Notary Public, Judge, Registrar of a court, lawyer, Kaumatua, chartered accountant, registered medical doctor, or registered teacher. Note that the trusted referee must not be related to you.

The trusted referee must compare the original and photocopy, then write or stamp on the copied document 'This is a true copy and represents the identity of <your name>'. This must be followed by their name, occupation, address and phone number, signature and the date. The certification must appear on all copied pages of original proof of ID documents.

#### ➤ If you are in Australia

Any of the people listed in the *Identification (ID) rules and certification of documents* factsheet at [erf.aon.com.au/erfmemform.htm](http://erf.aon.com.au/erfmemform.htm) can certify your document copies.

The certifier must ensure that the original and the copy are identical, then write or stamp on the copied document 'Certified true copy'. This must be followed by their name, qualification, signature and the date. If an extract of a document is photocopied to verify your ID, the certifier should write or stamp 'Certified true extract'. The certification must appear on all copied pages of original proof of ID documents.

## PRIVACY

### Personal information

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

## DECLARATION AND AUTHORISATION

I declare that:

- I have elected to open a KiwiSaver scheme account and to transfer my superannuation benefit from Australia to New Zealand
- I request and consent to the payment of my full superannuation benefit to the nominated KiwiSaver scheme account
- I am aware that I may ask the trustee of the Aon Eligible Rollover Fund for all the information I need to understand my benefit entitlements in the fund (including exit, transfer, withdrawal and other fees, investment options and the effect of transfer on these benefit entitlements) and I do not require any further information
- I understand and acknowledge the implications of transferring my benefits from the Aon Eligible Rollover Fund
- I authorise the deduction of any applicable withdrawal and transfer fees by the trustee of the Aon Eligible Rollover Fund
- I have read the Aon Privacy Policy and the ETSL Privacy Policy, and consent to my personal (including sensitive) information being handled in accordance with these policies
- I have fully read this form and the information I have provided on this form is true and accurate.

Signature

Date

See checklist on page 4.

## CHECKLIST

- I have attached a document from the KiwiSaver scheme confirming that it will accept transfers from an Australian superannuation fund.
- I have attached proof of my residential address in New Zealand.
- I have completed and had witnessed the New Zealand statutory declaration on page 2 (or a Commonwealth of Australia statutory declaration as attached) to confirm that I am a former resident of Australia and have emigrated permanently to New Zealand.
- I have attached a 'certified' copy of photo ID as listed under *Proof of identity* on page 3.
- I have signed and dated the *Declaration and authorisation* on page 3.