Transfer your Super to New Zealand

(Trans Tasman Portability)

Need help?

Please refer to the information and relevant websites detailed below. You can call us on **1800 682 626**, or **+61 3 8306 0984** if calling from overseas, if you need further assistance.

Are you eligible?

In order to be eligible to transfer your super to a KiwiSaver Scheme in New Zealand, you must:

- have left Australia to permanently live in New Zealand; **and**
- be a current member of a KiwiSaver Scheme

Note:

1. If you are a temporary resident of Australia, different rules may apply.
2. If your benefit includes an untaxed element or is a defined benefit interest, you will not be eligible.

Please call us on **1800 682 626** or **+61 3 8306 0984** if calling from overseas, if you have any questions.

Important information

- The whole of your benefit must be transferred to the nominated KiwiSaver Scheme in New Zealand. Payment of part of your benefit is not permitted under any circumstances.
- You will be able to access your Australian super when you reach age 60 and satisfy the Australian definition of retirement at that age. Your KiwiSaver portion (the amount accumulated in New Zealand, together with earnings on your Australian super) can only be accessed when you reach the New Zealand retirement age of 65.
- The Trustee recommends that you seek independent professional financial advice before proceeding.

What you need to provide

1. **An original copy of a letter of compliance from your KiwiSaver Scheme** that (a) confirms the Scheme will accept payment and (b) provides details of the Scheme's bank account (refer Step 5 on the Trans Tasman Portability form for full details).

2. **Certified proof of identity.**
   What are the requirements?
   You will need to provide a ***certified copy*** of either your current driver's licence or current passport **OR** your birth certificate **AND** one document from list two.

List One	List Two
Birth certificate	New Zealand utility bill (electricity, gas or water bill) issued in the last 3 months
	New Zealand landline phone bill issued in the last 3 months (mobile phone bills will NOT be accepted)

Who can certify documents in New Zealand?

The following people are authorised to certify your documents in New Zealand:

- Justice of the Peace
- Registered medical doctor
- Registered teacher
- Lawyer
- Notary Public (there may be a charge)
- Chartered Accountant
- Kaumátua
- Member of the police

How to certify your documents.

The authorised person needs to:

- Compare the photocopy to the ORIGINAL
- Include the following details on the photocopy
  - Write "Certified true copy" on the photocopy; and
  - Write their name, qualification and registration number (if applicable); and
  - Sign and date the photocopy
  - Date their certification (must be within 12 months of receipt)

3. **Proof of New Zealand Residency**
   A copy of a New Zealand utility bill (electricity, gas or water bill) or landline phone bill issued in the last 3 months **OR** a copy of a tenancy/leasing agreement for a New Zealand property in which you reside.

Need help?

1800 682 626 **equipsuper.com.au** Equip Super, GPO Box 4303, Melbourne VIC 3001

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as trustee for Equipsuper ABN 33 813 823 017 USI 33 813 823 017 000

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4. A completed statutory declaration witnessed by an eligible person.

You can provide a New Zealand **OR** an Australian[3] statutory declaration. A copy of each type of declaration is attached at the end of this form.

Witness to a statutory declaration

A statutory declaration must be witnessed by a person who is eligible to do so under the law in either Australia or New Zealand. The people who can witness your statutory declaration in New Zealand will generally be different to those who can certify your proof of identity documents (refer to item 2 on previous page). The table below is provided as a guide only.

For a full list of people who can witness a statutory declaration, please refer to the following websites:

New Zealand
legislation.govt.nz/act/public/1957/0088/latest/whole.html

Australia
ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx

	Can certify proof of identity documents	Can witness a New Zealand statutory declaration	Can witness an Australian statutory declaration
New Zealand Notary Public[1]	✓	✓	✗
Australian Notary Public	✓	✗	✓
Person enrolled as a barrister and solicitor of the High Court of New Zealand	✗	✓	✗
New Zealand Justice of the Peace	✓	✓	✗
Consular or Diplomatic Officer at the Australian High Commission in Wellington[2]	✓	✗	✓
Consular or Diplomatic Officer at the Australian Consulate-General in Auckland[2]	✓	✗	✓

Notes and further information:

[1] If you elect to use a **New Zealand statutory declaration**, a Notary Public can also certify your proof of identity documents.

[2] **The Australian statutory declaration** must be signed in front of the Consular or Diplomatic Officer and cannot be witnessed by mail. It is not necessary to make an appointment, but you will be charged a small fee. You will be required to present current photo ID, showing both your current name and signature. The Consular or Diplomatic Officer can also certify your proof of identity documents. Please refer to the Australian High Commission website for further information – **newzealand.embassy.gov.au**

[3] If you complete an Australian statutory declaration in Australia, please refer to the Australian website in point 4 above, for a full list of people who can witness your Australian statutory declaration in Australia.

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Trans Tasman Portability

Equip Super

If you need help

For assistance please call our Helpline on **1800 682 626** or **+61 3 8687 1842** if calling from overseas, or refer to **equipsuper.com.au**

1 – Your personal details

Please complete in pen using CAPITAL letters

Member number

Title
Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

Sex
Male ☐ Female ☐

Date of birth (ddmmyyyy)

First name

Last name

Previous name (if applicable)

Residential address (must be provided)

Suburb

State

Postcode

Postal address (if different from Residential address)

Suburb

State

Postcode

Business hours phone

After hours phone

Mobile

Email

2 – Your previous Australian address

Previous residential address in Australia

Suburb

State

Postcode

Date left Australia

3 – Attach documentation if your personal details have changed

Name and Date of birth changes – see the 'Proof of identity' guide on the website **equipsuper.com.au/identity**

Address changes – attach a copy of a recent bill, mail item or driver's licence that displays your new residential or postal address.

If the required supporting documentation is not provided, the payment of your benefit will be delayed.

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4 – Provide details of your KiwiSaver Scheme

KiwiSaver Scheme name

KiwiSaver registration number

KiwiSaver Scheme address

Suburb | City | Postcode

Your KiwiSaver account number

Your IRD number - -

5 – KiwiSaver Bank Account details and letter of compliance

Bank SWIFT Number

Bank name

Bank address

Suburb | City | Postcode

Beneficiary nam

Beneficiary addres

Suburb | City | Postcode

Beneficiary account numbe

Bank *Branch* *Account number* *Suffix*

☐ The above KiwiSaver Scheme can accept the transfer. I understand that if this is not correct, the KiwiSaver Scheme will not be able to process my super and my benefit will be refunded to my super fund.

Unless advised otherwise, we will make payment electronically in New Zealand dollars. The exchange rate will be calculated at the date of transfer.

You must attach the original of a letter of compliance from your KiwiSaver Scheme that confirms the above information.

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6 – Trans Tasman documentary evidence and checklist

Please use the following check list to assist you in providing the correct documents. Please note that if we do not receive the correct documents your request will be delayed.

- ☐ Letter of compliance from your KiwiSaver Scheme confirming they will accept the transfer
- ☐ Bank account details as follows:
  - ☐ Bank SWIFT code
  - ☐ Bank name and address
  - ☐ Beneficiary name
  - ☐ Beneficiary address
  - ☐ Beneficiary account number
- ☐ Certified proof of identity documents
- ☐ Evidence of your permanent residence at a New Zealand address, for example:
  - ☐ a copy of an electricity, gas, water bill or landline phone bill issued in the last 3 months; or
  - ☐ a copy of a tenancy/leasing agreement for a New Zealand property

If you have used a New Zealand statutory declaration:

- ☐ The statutory declaration has been witnessed by a person authorised to take statutory declarations in New Zealand under the NZ Oaths and Declarations Act 1957

If you have used an Australian statutory declaration:

- ☐ The statutory declaration has been witnessed by a person who is able to witness statutory declarations under the Australian Statutory Declarations Act 1959

Privacy

The personal information you provide on this form will be used in accordance with Togethr Trustee's Privacy Statement, which you can view online at **equipsuper.com.au/privacy** or you can obtain a copy by contacting us on **1800 682 626**.

Togethr Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

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7 – Sign the form

By signing this form I:

- understand the information contained in this form will be relied upon and used by the Equip Super to process my Trans Tasman Portability request. It may be disclosed to the administrator, government agencies, my employer and other parties as required, including the trustee of my nominated KiwiSaver Scheme.
- understand and consent to my information being collected, disclosed and used in the manner set out in this form. If I do not provide the information, my payment request may not be processed.
- request and consent to the payment of the whole of my withdrawal benefit to my nominated KiwiSaver Scheme.
- understand there may be a delay in payment if my details have changed or if I do not provide the correct documents.
- can access my personal information by contacting Equip Super's Privacy Officer.

Signature

X

Date (ddmmyyyy)

Send your completed form with your documentary evidence to Equip Super, GPO Box 4303, Melbourne, VIC 3001.

NZ Statutory declaration - **Note: You only need to complete and return one statutory declaration**

This statutory declaration must be signed in New Zealand by an authorised person. Refer to the Fact Sheet attached.

DECLARED by

First name

Last name

of (address)

occupation

request the transfer of my total withdrawal benefit from Equip Super to my nominated KiwiSaver Scheme.

I solemnly and sincerely declare that:

1. I permanently emigrated from Australia to New Zealand on Date (ddmmyyyy) and;
2. all the information I have provided in this form regarding my application is true and correct **and I make this solemn declaration** conscientiously believing the same to be true and by virtue of the **Oaths and Declaration Act 1957**.

Signature of member

X

Declared at (address)

on (date) (ddmmyyyy)

Before me (Justice of the Peace or other person entitled to take a Statutory Declaration)*

Please specify office held

Signature

X

** Please refer to the following website for further information on who can witness a statutory declaration under the NZ Oaths and Declarations Act 1957* – **legislation.govt.nz/act/public/1957/0088/latest/whole.html**

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Australian Statutory declaration - **Note: You only need to complete and return one statutory declaration**

This statutory declaration can be made before a person who is able to witness statutory declarations under the Australian **Statutory Declarations Act 1959**. This includes an Australian Consular or Diplomatic Officer at the Australian High Commission in Wellington, or at the Australian Consulate-General in Auckland. **New Zealand Justices of the Peace, solicitors etc. are unable to witness this statutory declaration.**

Commonwealth of Australia
STATUTORY DECLARATION
Statutory Declarations Act 1959

DECLARED by

First name

Last name

of (address)

occupation

make the following declaration under the Statutory Declarations Act 1959:

1. I permanently emigrated from Australia to New Zealand on Date (ddmmyyyy) and;
2. all the information I have provided in this form regarding my application is true and correct.

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.

Signature of member

X

Declared at (address)

on (date) (ddmmyyyy)

Before me (Justice of the Peace or other person entitled to take a Statutory Declaration)

Qualification

of (address)

Signature

X

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 Declarations Act 1959.

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

Note 3. Please refer to the following website for further information on who can witness an Australian statutory declaration – **ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx**

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