How to transfer your GuildSuper account to a KiwiSaver scheme

If you are planning on moving permanently to New Zealand, you may be able to transfer your superannuation savings from GuildSuper to a New Zealand KiwiSaver scheme. Below you will find information about what you need to do to transfer your GuildSuper account to a KiwiSaver account. Please follow the instructions below to complete your application.

What you need to do

Check your eligibility

To transfer your GuildSuper account to your KiwiSaver scheme, you must:

- have an active KiwiSaver account and your provider must be able to accept transfers from Australia, and
- have permanently emigrated to New Zealand, and
- transfer your entire GuildSuper balance to your KiwiSaver account.

Payment of part of your super benefit to a KiwiSaver account is not permitted under any circumstances. It is recommended that you seek independent professional financial advice before proceeding.

Apply to transfer your account

1. Complete the application form

Complete the attached Request to transfer whole balance of superannuation benefits to KiwiSaver Scheme form.

2. Provide Supporting Documents

To transfer your GuildSuper account to KiwiSaver scheme, you must provide:

a) **Proof of your identity (ID).** Include certified proof of identity documents in accordance with the instructions under the Completing Proof of Identity section.

b) **Letter of Compliance from your KiwiSaver scheme.** Include a Letter of Compliance from your KiwiSaver scheme confirming that they will accept the transfer and the bank details containing: Bank SWIFT code, Bank name and address, Beneficiary name, Beneficiary address and Beneficiary account number.

c) **Proof of residence in New Zealand.** If the document you used to provide proof of your ID doesn't have your current New Zealand address, you will need to provide us with another document e.g. utility bill, council rate notice or bank statements that are less than 12 months old.

d) **A signed Statutory Declaration stating you have permanently emigrated to New Zealand.** You must complete an Australian or New Zealand statutory declaration stating you have permanently emigrated to New Zealand. Different rules apply for Australian and New Zealand statutory declarations.

Witness for a New Zealand statutory declaration

A list of people who can be witnesses is set out in Section 9 to the New Zealand Oaths and Declarations Act 1957 which can be accessed via the following link: www.legislation.govt.nz/act/public/1957/0088/latest/DLM314584.html.

Witness for an Australian Commonwealth Statutory Declaration

A list of people who can be witnesses is set out in Schedule 2 to the Statutory Declarations Regulations 1993 which can be accessed via the following link: www.ag.gov.au/legal-system/statutory-declarations.

To make a Commonwealth statutory declaration overseas, you should be able to contact a person listed under Schedule 2 as an authorised witness at the nearest Australian Embassy, High Commission or Consulate. You may be charged a fee for this service. For details of an Australian Consulate close to you, go to www.dfat.gov.au/missions.

Send it back to us

If you meet the eligibility criteria, complete the Request to transfer whole balance of superannuation benefits to KiwiSaver Scheme form. Make sure you complete all mandatory fields. If you don't, we may not be able to process your request. All completed forms and documentation can be mailed to: **GuildSuper, GPO Box 1088, Melbourne VIC 3001**

Need more help?

If you need help or don't know if your proof of ID is acceptable, give us a call before you get started. Call us on 1300 361 477, 9.00am to 6.00pm (AEST) Monday to Friday.

For more information on transfers to a KiwiSaver scheme visit www.ato.gov.au.

Continued over...

Request to transfer whole balance of superannuation benefits to KiwiSaver Scheme

GuildSuper

Completing this form

- Refer to instructions where indicated with a ➔
- This form is only for whole (not part) balance transfers.

➔ Returning this form is easy

Sign and date the authorisation and mail it back to us along with all supporting documents.

Personal details (please provide your current details)

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐ (please specify): ☐ Gender M/F* ☐ Date of birth* ☐

Surname* ☐ Given name(s)* ☐

Other/previous names ☐

Tax file number ☐ IRD Number* ☐

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be tax consequences

CURRENT ADDRESS IN NEW ZEALAND (residential, no P.O. Boxes)

Address* ☐ Postcode ☐

Country NEW ZEALAND Contact phone number* ☐ Email* ☐

PREVIOUS ADDRESS ➔ Last known address in Australia (the address held by GuildSuper)

Address* ☐ State ☐ Postcode ☐

Fund details

FROM

Fund name GuildSuper

GPO Box 1088, Melbourne Vic 3001

Fund phone number 1300 361 477

Membership or account number ☐

Australian business number (ABN) 68 964 712 340

Unique Superannuation Identifier (USI) 68 964 712 340 020

TO

KiwiSaver Scheme name* ☐

KiwiSaver registration number* ☐

KiwiSaver phone number* ☐

KiwiSaver Membership number* ☐

KiwiSaver Scheme Address* ☐

! If you have multiple account numbers with GuildSuper, you must complete a separate form for each account you wish to transfer.

Checklist

I have attached:

- ☐ a certified copy of my proof of identity
- ☐ a letter of compliance from my KiwiSaver Scheme confirmin they will accept the transfer along with bank details.
- ☐ proof of my residence in NZ showing address e.g utility bill, council rates etc.
- ☐ an Australian or New Zealand Statutory Declaration stating I have permanently emigrated to New Zealand

Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my super-annuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I discharge the superannuation provider of my **FROM** fund of all further liability in respect of the benefits paid and transferred to my **TO** fund.
- I wish to transfer my entire benefit to my Kiwi Saver Account.
- I have permanently emigrated to New Zealand.
- My KiwiSaver provider has confirmed they can accept this transfer.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

Name* ☐ Signature* ✗ ☐ Date* ☐

* Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

New Zealand Statutory Declaration – Transfer to Kiwisaver

Complete this form if you wish to make a New Zealand statutory declaration.

This form must be signed in New Zealand by a Deputy Registrar/Registrar of the High Court or any District Court, Justice of the Peace, or Solicitors or Notary Public or Officer authorised to take and receive Statutory Declarations.

For more information on who can witness a Statutory Declaration visit: www.legislation.govt.nz/act/public/1957/0088/latest/DLM314584.html.

For further information visit www.justice.govt.nz/tribunals.

Declaration

I, *First name* | *Surname*

Address in full

OF

Occupation

do solemnly and sincerely declare that *(please state the facts of your declaration):*

1. I permanently emigrated from Australia to New Zealand on ☐☐ / ☐☐ / ☐☐☐☐ *(DD/MM/YYYY)*

2. All supporting documents provided with this application are true and correct

And make this solemn declaration conscientiously believing the same to be true, and by virtue of the Oaths and Declarations Act 1957.
I am aware that if I deliberately provide false information in this Declaration I could be charged with an offence and sentenced in court.

Signature declarant

Signature of person making the declaration ✗

Name of Signatory

Declared at *Place* on the *Date* day of *Month* in the year *Year*

Before me

Signature of person witnessing the declaration ✗

Name of Signatory (Please use BLOCK letters)

Qualication of Signatory

Contact Address of Signatory
(Please use BLOCK letters)

Date (DD/MM/YYYY) ☐☐ / ☐☐ / ☐☐☐☐

Please send completed form to **GuildSuper, GPO Box 1088, Melbourne VIC 3001**

Australian Statutory Declaration – Transfer to Kiwisaver

Complete this form if you wish to make an Australian statutory declaration.

To transfer your Australian superannuation monies to a KiwiSaver Scheme, you must complete a statutory declaration stating that you have permanently emigrated to New Zealand. For more information on who can witness your Statutory Declaration please visit: www.ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx.
New Zealand Justices of the Peace, solicitors etc. cannot witness an Australian statutory declaration.

Declaration

I, *First name* _____ *Surname* _____

OF *Address in New Zealand* _____

make the following declaration under the Statutory Declaration Act 1959:

1. I permanently emigrated from Australia to New Zealand on ____ / ____ / ____ *(DD/MM/YYYY)*
2. All supporting documents provided with this application are true and correct

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

Person making this declaration

Signature of person making the declaration ✗ _____ *Name of Signatory* _____

Declared at *Place* _____ on the *Date* _____ day of *Month* _____ in the year *Year* _____

Declared before me

Signature of person witnessing the declaration ✗ _____ *Name of Signatory (Please use BLOCK letters)* _____

Qualification of Signatory _____

_____

Contact Address of Signatory (Please use BLOCK letters) _____

Date (DD/MM/YYYY) ____ / ____ / ____

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.

Please send completed form to **GuildSuper, GPO Box 1088, Melbourne VIC 3001**

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