# Transfer to KiwiSaver account

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

## Important information

If you have any questions, please call us on **1300 614 644** or email **enquiry@smartmonday.com.au**

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 e.g. utilities bill, bank statement, council rates, tenancy agreement
- complete the New Zealand statutory declaration on page 3 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 4)
- attach a 'certified' copy of photo ID e.g. passport details page or driver's licence (see *Proof of identity* on page 4).

If you are a employer-sponsored member of smartMonday PRIME, we will also require your employer to confirm to us in writing that no further contributions will be made to your smartMonday account and the date the last contribution was made to your account.

## Your details

☐ I am a personal member

☐ I am a member of an employer-sponsored plan

Employer name (if applicable)

Member number

Given names Surname

Date of birth (DD/MM/YYYY)

Phone (mobile) Email

**Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001**

Issued on behalf of Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL 229757, RSE Licence L0001458 as trustee of the Smart Future Trust ABN 68 964 712 340 (the Fund). smartMonday Products are part of the Fund.

Issued 12 February 2026

Last residential address in Australia

Suburb | State | Postcode

Residential address in New Zealand

Suburb | State | Postcode

Your New Zealand IRD number

KiwiSaver scheme name

Postal address

Suburb | State | Postcode

KiwiSaver scheme registration number | Your KiwiSaver scheme account number

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# New Zealand statutory declaration

*Oaths and Declarations Act 1957*

1. Insert the name, New Zealand address (cannot be a P.O. box) and occupation of person making the declaration

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
Declared at

4. Day
on

5. Month and year
of

6. Signature of person before whom the declaration is made (see next page)
Before me,

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

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# 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*.

## Commonwealth of Australia declaration

You may choose instead to complete a *Commonwealth of Australia statutory declaration*. 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 (e.g. passport details page or driver's licence).

Please refer to the *Identification (ID) rules and certification of documents factsheet* 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* 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

The fund is subject to the trustee's privacy statement, which is available at eqt.com.au/global/privacystatement

## 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 Fund for all the information I need to understand my benefit entitlements in the fund (including insurance, 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 Fund.
- I have read the privacy statement and consent to my personal information being handled in accordance with the policies
- I have fully read this form and the information I have provided on this form is true and accurate.

Signature

Date (DD/MM/YYYY)

## 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 3 (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 4.
- ☐ (*if you an employer-sponsored member*) I have asked my employer to confirm to you in writing that no further contributions will be made to my smartMonday account and the date the last contribution was made to my account.
- ☐ I have signed and dated the *Declaration and authorisation* on this page.

**Send your completed form to: smartMonday, GPO Box 1202, Brisbane QLD 4001.**