

SuperEasy KiwiSaver Superannuation Scheme

First or Second-chance Home Withdrawal Application

Am I eligible to withdraw?

To be eligible to withdraw for a first home you must have been a contributing member of KiwiSaver for at least three years, have not owned property before, have not made a KiwiSaver First home withdrawal before and are withdrawing in order to purchase a property which will be your principal place of residence.

If you have owned property before and are in the position of a first home buyer, you can apply for a second-chance home withdrawal – you must first apply for approval through Kāinga Ora and submit the approval letter as part of your withdrawal application.

What can I withdraw?

You are able to withdraw your full available KiwiSaver balance excluding \$1,000 and any funds transferred from an Australian superannuation scheme.

What's next?

Once completed, scan and email this form and all additional information (see checklist in **Section E**), to admin@supereasy.co.nz, or you can post to:

SuperEasy
PO Box 5521
Wellington 6140

Please send the form to us at least two weeks before the funds are required for settlement or deposit. Any information missing from this application may delay your application.

Any Questions?

If you have any questions please contact us on 04 978 1250 or at admin@supereasy.co.nz

A. Personal details

Title	Membership number	Date of birth	
		D D	M M Y Y Y Y
Name		Surname	
First name(s)			
Home address	Number & street	Suburb	Town/city
		Postcode	
Postal address	Number & street	Suburb	Town/city
<small>(if different to above)</small>		Postcode	
Phone	Home	Mobile	
Email address			

B. Your withdrawal request

Reason for withdrawal: First home withdrawal
This applies to applicants who have not held an estate in land before, whether alone or jointly with another person.

Second-chance home withdrawal
This applies to applicants who have held an estate in land before. You will need to attach confirmation from Kāinga Ora that you qualify for a second-chance home withdrawal.

Amount of withdrawal: My full available balance A partial amount of \$

Funds are for: Deposit on D | D | M | M | Y | Y | Y | Y Settlement on D | D | M | M | Y | Y | Y | Y

C. Solicitors details

Solicitors name	First Name	Surname	
Solicitors company name			
Solicitors address	Number & street	Suburb	Town/city
		Postcode	
Phone	Email address		

D. Confirmation

By signing this form you confirm that:

- you are eligible to withdraw under the reason indicated in **Section B** of this form
- you have read and understood the Privacy Statement in **Section F** of this form
- the information provided in this form is true and correct, and will be used to update your membership information
- you understand that your withdrawal value will be based upon the unit price(s) at the date your request is processed

Signature

Date D | D | M | M | Y | Y | Y | Y

More information required overleaf

E. Checklist

! Please send us all of the information in this checklist

- Completed application form, with Statutory Declaration (**Section G**) signed by a JP, Solicitor, notary public or person authorised to take a statutory declaration
- Certified** (must be signed by a JP or Solicitor) copy of some identification, this could be either:
 - a current passport; or
 - a NZ driver's licence (both sides) **and** either a **certified** copy of a statement from a registered bank, or a birth certificate
- Proof of address. Usually a utility bill or bank statement, this must have been issued within the last 12 months
- Solicitors trust account bank deposit slip
- Solicitors letter of undertaking. Contact us on 04 978 1250, or at admin@supereasy.co.nz for a template
- Copy of the Sale and Purchase agreement for the property
- Letter from Kāinga Ora confirming that you are eligible for a Second-Chance Home Withdrawal. **You only need to submit this if you have owned an estate in land before.**

F. Privacy statement

The personal information you have provided in this Form, or that you provide in the future, will be collected and held by Civic Financial Services Limited as Administration Manager for purposes of marketing, operation and management of the SuperEasy KiwiSaver Superannuation Scheme, and compliance with any laws, rules and regulations in New Zealand, or in any other country, including the Anti-Money Laundering and Countering Financing of Terrorism Act 2009 and the Common Reporting Standard for the Automatic Exchange of Information as it applies in New Zealand.

Your personal information may be disclosed to the following:

- Inland Revenue (who may share the information with overseas tax authorities under intergovernmental agreements to exchange financial account information)
- your employer
- Financial Markets Authority
- any other persons or entity

where it is relevant to do so for the purposes set out above.

If you do not provide some or all of the information requested in this form, we may not be able to accept your application.

You have the right to know what personal information the SuperEasy KiwiSaver Superannuation Scheme's Administration Manager is holding in respect of you. Pertinent details will be shown on your Member Statements. You also have the right to request that we correct your personal details if they are wrong. You can do this by contacting the Administration Manager at: Civic Financial Services Limited, PO Box 5521, Wellington 6140. Any update to your personal information may be used to update other information the Administration Manager holds for you.

Office use only

Accepted <small>(For and on behalf of the Trustee)</small>

Date accepted

D	D
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M	M
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Y	Y	Y	Y
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G. Statutory declaration

1. Eligibility for Government Contributions

To be eligible for government contributions in a year, you must have been mainly residing in New Zealand. If you were only residing in New Zealand for part of the year, you won't be eligible for any government contributions that relate to the period you were residing offshore and you won't be able to withdraw them. During your KiwiSaver membership, were there any periods when you weren't residing in New Zealand?

- No (continue to **Statutory declaration** below)
- Yes. List below the periods your principal place of residence was outside of New Zealand:

From			To		
D D	M M	Y Y Y Y	D D	M M	Y Y Y Y
D D	M M	Y Y Y Y	D D	M M	Y Y Y Y
D D	M M	Y Y Y Y	D D	M M	Y Y Y Y

Note, that if you were working overseas as an employee of the New Zealand Government or as a volunteer for certain charitable organisations, you are still eligible to receive government contributions. If this is the case, please include evidence with your application.

Statutory declaration

I

of

and

do solemnly and sincerely declare that:

- I have permanently resided in New Zealand for the duration of my KiwiSaver membership other than the period listed in Section 1 above.
- I understand that for the periods my principal place of residence was outside of New Zealand during my KiwiSaver membership, I will not be entitled to withdraw any government contributions received. Any government contributions claimed on my behalf during any such period will be returned to the Commissioner of Inland Revenue. The information provision in section G1 is correct to the best of my knowledge.
- I confirm that except where this application relates to a second-chance home withdrawal, I have either not held an estate in land before (whether alone or jointly with another person), or any previous estate was or is held on the basis described in Rule 8(5) of the KiwiSaver Scheme Rules.
- The property I'm purchasing is intended to be my principal place of residence.
- I haven't made a first home withdrawal from a KiwiSaver scheme before.
- I've been a member of a KiwiSaver scheme and / or a complying superannuation fund for a combined total of at least three years, or Inland Revenue received a contribution to a KiwiSaver scheme for me at least three years ago.
- I understand \$1,000 and any amount transferred from an Australian complying superannuation scheme can not be withdrawn for a first home withdrawal.
- The information I have provided on this application is true and correct to the best of my knowledge.

And I make this solemn declaration conscientiously believing the same to be true, and by virtue of the New Zealand Oaths and Declarations Act 1957.

Signature <small>(of person making the declaration)</small>	Date of declaration
	D D M M Y Y Y Y

Before me:

JP, Solicitor, notary public, or person authorised to witness a statutory declaration under Section 9 of the Oaths and Declarations Act 1957