



We can only accept voluntary contributions in limited circumstances due to UniSaver's exemption from some of the provisions of the Anti-Money Laundering and Countering Financing of Terrorism Act 2009.

Use this form to:

- transfer a benefit from another scheme into UniSaver
- make a lump sum contribution in order to maximise your government contribution.

Personal and contact details

Mr Mrs Miss Ms Dr Assoc Prof Prof

Surname Given names

Membership number Date of birth (DD/MM/YYYY)

Email IRD number*

Work phone Home phone Mobile

* Locked members only – Inland Revenue requires us to hold IRD numbers for locked members. Note your IRD number here if you haven't provided it to us before.

Complete the relevant section

1. Transfer from another superannuation scheme into UniSaver

The transfer must be made by your old scheme. You can't withdraw the money and then deposit it with UniSaver. We cannot accept transfers from KiwiSaver schemes, Australian superannuation schemes or UK pension plans.

I wish to transfer the amount of \$ _____ from the following superannuation scheme into UniSaver.

Scheme name

Contact person

Phone Email

2. Contribution to top up locked account

Call the helpline on 0800 864 724 if you're not sure how much you need to contribute to maximise your government contribution. We cannot accept contributions over and above this amount. Government contributions are only made up to age 65.

I am a locked member and wish to make a voluntary contribution of \$ _____ to my member locked account to bring my annual contribution to that account up to \$1,042.86 so that I qualify for the maximum government contribution.

Paid by internet banking to 01 0505 0620010 28 (use your surname and member number as the reference).

A cheque for the amount shown above is enclosed (made out to UniSaver New Zealand).

I understand that voluntary contributions are not subsidised by my employer.

Signed by (MEMBER) Date (DD/MM/YYYY)

If you have any queries about completing this form, please call 0800 864 724 or email unisaver@mercerc.com.

Email this form to unisaver@mercerc.com

Alternatively, post the form to:

UniSaver New Zealand
 c/o Mercer (N.Z.) Limited
 PO Box 1849
 Wellington 6140