



This form is only for locked members who are **not** leaving service. Use option 3 below if you want to transfer funds from the locked section to your KiwiSaver scheme to make a first-home withdrawal from that scheme.
• Use **form 9** Leaving service if you are leaving employment.
• Use **form 12** Deferred member partial or total withdrawal if you are a deferred member.

Personal and contact details

Mr / Mrs / Miss / Ms / Dr / Assoc Prof / Prof SURNAME GIVEN NAMES
Membership number Date of birth DD/MM/YYYY
Email
Work phone Home phone Mobile

Select type of withdrawal - tick one option

Option 1 - Partial withdrawal

I confirm that I am aged 65 or over and have completed 5 or more years' membership of the locked section (or another complying superannuation fund or KiwiSaver scheme) and wish to make a partial withdrawal from my locked accounts of \$

Option 2 - Total withdrawal

I confirm that I am aged 65 or over and have completed 5 or more years' membership of the locked section (or another complying superannuation fund or KiwiSaver scheme) and I wish to withdraw the full balance of my locked accounts.
Your withdrawal will be paid by direct credit to your bank account (attach a deposit slip or bank statement showing your account number).

Option 3 - Transfer to a KiwiSaver scheme or complying superannuation fund

I wish to transfer the full balance of my locked accounts to the following KiwiSaver scheme or complying superannuation fund:
Provider name
Member number with the above provider
From age 65, you are no longer eligible for member tax credits.

Checklist - make sure you include the following:

- Fully completed form (including the statutory declaration on page 2).
Deposit slip or bank statement showing your account number.

Signed MEMBER Date DD/MM/YYYY

If you have any queries about completing this form, please call 800 864 724 or email unisaver@mercero.com.

Scan and email this form to unisaver@mercero.com

Alternatively, post the form to:

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

Statutory declaration

I **ENTER YOUR FULL NAME**

of **ENTER THE ADDRESS WHERE YOU LIVE**

ENTER YOUR OCCUPATION

solemnly and sincerely declare:

- I am entitled to make this claim.
- During my membership of the locked section of UniSaver and/or a KiwiSaver scheme – *tick one*

there were no periods when my principal place of residence was not New Zealand

New Zealand has been my principal place of residence except during the periods set out below:

Start date:

End date:

Start date:

End date:

This relates to the withdrawal of member tax credits.

- The information I have provided in this form is 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.

Note: Do not complete the following section until you are with the person witnessing your declaration.

Your signature

Declared at **PLACE, FOR EXAMPLE, TOWN OR CITY**

Date **DD/MM/YYYY**

Before me **NAME OF OFFICIAL WITNESS**

Justice of the Peace, solicitor, notary public or other person authorised to take a statutory declaration.

Signature **OF OFFICIAL WITNESS**