

To be eligible to make withdrawals from your locked accounts, you need to have:

- reached age 65
- completed 5 or more years' membership of the locked section (or another complying superannuation fund or KiwiSaver scheme). (The 5-year rule will change on 1 July 2019. Call the helpline for more information.)

### 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(s) of withdrawal

A transaction fee is charged for withdrawals and transfers from deferred accounts. See [unisaver.co.nz](http://unisaver.co.nz) for the current fees. Your withdrawal will be paid by direct credit to your bank account (attach a deposit slip or bank statement).

#### Option 1 – Partial withdrawal (standard account)

I wish to make a partial withdrawal of \$ ..... from my member standard account.

I understand that:

- I must make a total withdrawal if this withdrawal reduces the balance in my accounts to less than \$5,000
- a fee will be charged for the second or any subsequent withdrawal in any 12-month period.

#### Option 2 – Total withdrawal (standard account)

I wish to make a total withdrawal of my member standard account.

#### Option 3 – Withdrawal (locked accounts)

I confirm that I am aged 65 or over and have completed 5 or more years' membership of the locked section. (The 5-year rule will change on 1 July 2019. Call the helpline for more information.)

I wish to make a partial withdrawal from my locked account balances of \$ .....

I wish to withdraw the full balances in my locked accounts.

#### Option 4 – Transfer (locked accounts)

I wish to transfer the balances in my locked accounts that I am not yet entitled to withdraw to the following KiwiSaver scheme or complying superannuation fund.

Scheme name: ..... Contact: .....

Address: .....

## All members to complete

I acknowledge that, if I make a total withdrawal, once payment of my account balances and the requested transfer of my locked account balances (if applicable) has been made, I will have received full rights in accordance with UniSaver's trust deed and have no further claims against the trustee.

Signed **MEMBER**

Date **DD/MM/YYYY**

### Checklist – make sure you include the following:

- Form completed in full (including the statutory declaration on this page if you are withdrawing all or part of your locked account balances).
- Deposit slip or bank statement for the account your withdrawal is to be paid into (not required if you are transferring your balances to another scheme).

If you have any queries about completing this form, please call 800 864 724 or email [unisaver@mercerc.com](mailto:unisaver@mercerc.com).

**Scan and email** this form to [unisaver@mercerc.com](mailto:unisaver@mercerc.com)

**Alternatively, post** the form to:

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

**Statutory declaration** – complete if your withdrawal includes all or part of your locked account balances

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 government contributions.

- 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**