

# Transfer to a KiwiSaver account

B07



right by your side

## Use this form and statutory declaration to transfer your Brighter Super benefit to your KiwiSaver account.

If you are a pension or defined benefit member you will need to convert your account to an Accumulation account before you can request a transfer to a KiwiSaver account.

You can only transfer your Brighter Super benefit to a New Zealand KiwiSaver account if you have permanently emigrated to New Zealand.

Once all requirements have been received Brighter Super must transfer your benefit within 30 days. However, after we have received your correctly completed form and any additional documents required, we will generally process your payment within 3-7 business days.

### Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Member number	Account number	Given name/s	
Surname		Date of birth / /	
Email		Phone number	
Residential address			
Suburb/town		State	Postcode
Postal address (if different to above)	State	Postcode	Tax file number (TFN) <sup>1</sup>

<sup>1</sup> For more information on providing your TFN please read the Important information located on page 4.

## Important information

### 1. Transfer Amount

You can only transfer your full benefit from Brighter Super into a KiwiSaver account. Partial transfers won't be accepted.

### 2. No tax on your transfer

Your benefit will not be taxed upon transfer to your KiwiSaver account.

### 3. Transferring from a KiwiSaver account

For information on how to transfer your KiwiSaver account to a Brighter Super account please refer to our website [brightersuper.com.au/kiwisaver](http://brightersuper.com.au/kiwisaver).

### 4. Currency conversion

When transferring your benefit to a KiwiSaver account, Brighter Super will not convert Australian dollars to New Zealand dollars before processing the transfer.

This means your KiwiSaver provider may charge you fees for the currency conversion before allocating the funds to your KiwiSaver account.

### 5. Privacy and personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website [brightersuper.com.au](http://brightersuper.com.au).

## 1 Claiming a tax deduction for personal contributions

Do you intend to claim a tax deduction on personal contributions made during the current or previous financial year?

- Yes - If you plan to claim a tax deduction for any personal contribution to the fund, please complete the *Notice of intent to claim or vary a deduction for personal super contributions* form on the Australian Taxation Office (ATO) website at [ato.gov.au](http://ato.gov.au). You must submit your completed form and receive acknowledgment from us before withdrawing or transferring the funds.
- No - Please proceed to the next applicable section.

**Note:** If you do not submit a valid *Notice of intent to claim or vary a deduction for personal super contributions* form before withdrawing or transferring the funds, your notice may not be valid for the entire contribution. You can only validly deduct the proportion of your contribution that remains in the fund.

## 2 Transfer my benefit to a KiwiSaver account

Please tick (✓) the below box(s) to confirm your request:

- I request that Brighter Super close my Accumulation account and transfer the full benefit to my KiwiSaver account.
- I confirm I have permanently emigrated to New Zealand.
- I understand closing my account will cancel any insurance cover on my account.

**Note:** You can only elect to make a full transfer of your Brighter Super benefit to your KiwiSaver account. We cannot accept partial transfers.

## 3 Details of KiwiSaver provider

Please provide the details of your New Zealand KiwiSaver account below.

### KiwiSaver provider details - Mandatory

<b>KiwiSaver provider name</b>	<b>KiwiSaver registration number</b>		
<b>Account number</b>	<b>Email</b>		
<b>Address</b>			
<b>Suburb/town</b>	<b>State</b>	<b>Postcode</b>	<b>Country</b>

## 4 Supporting Documents

To confirm you have permanently emigrated to New Zealand and are eligible to transfer your Superannuation benefit to a New Zealand KiwiSaver account you will need to:

- Complete the attached statutory declaration stating you have permanently moved to New Zealand; and
- Provide documentation showing your residence at an address in New Zealand such as a utilities bill, driver licence or government notice.

In addition to the above requirements you will also need to provide the following information to enable us to process your request:

- Provide documentation showing your KiwiSaver provider will accept a transfer from Brighter Super.
- Provide a certified copy for one of the following identity documents:
- Current driver licence (front and back)
  - Current government issued Photo identification card (front and back)
  - Current passport

**Please note:** the identification document you provide must still be valid and cannot be expired. The copy needs to be certified as a true copy of the original. Read the Proof of identity requirements information at [brightersuper.com.au](http://brightersuper.com.au) for more information.

This statutory declaration must be completed by the member and signed in the presence of a person authorised to witness statutory declarations. For more information on how to make a statutory declaration under the Oaths and Declarations Act 1957, please visit the New Zealand Government website.

I, \_\_\_\_\_  
 Of \_\_\_\_\_  
 Suburb/Town \_\_\_\_\_  
 State & Postcode \_\_\_\_\_  
 Occupation \_\_\_\_\_

**Solemnly and sincerely declare that**

- I have now permanently emigrated to New Zealand and consent to the payment of my whole balance to my KiwiSaver account.
- All information provided in or with this application 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*.

I understand if I deliberately make a false statement in this statutory declaration I could be charged with an offence and sentenced in court.

**Your signature**

**Date signed**

/ /

**Declared at** (Place, for example town or city)

**Before me** (Name and type of official witness)

**Date signed**

/ /

**Witness signature**

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

**Please note:**

A statutory declaration under the *Oaths and Declarations Act 1957* may be made before:

- a Justice of the Peace (JP)
- a solicitor or notary public — you may have to pay for their services
- a Registrar or Deputy Registrar of the District Court or the High Court
- authorised staff in some government agencies
- a member of Parliament.

## 6 Member Declaration

By signing this Transfer to KiwiSaver form I am making the following statements:

- I declare I am a permanent resident of New Zealand.
- I certify that the information completed on this form is true and correct and I have read the Important information section on this form.
- I am aware my benefit cannot be transferred from Brighter Super until I meet all requirements outlined in this form.
- I have an existing KiwiSaver account.
- My KiwiSaver provider has confirmed they can accept this transfer.
- I confirm I have completed all relevant sections of this form in full.
- I am aware I can contact Brighter Super for more information before completing this form.
- I understand any insurance cover attached to my account will be cancelled.

**Member Signature**

**Date signed**

/ /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form. If you are signing this form on behalf of the member please complete section 8 below.

## 7 Power of Attorney Signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member's attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member's Power of Attorney document and are authorised to act on the member's behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

<b>Attorney 1</b>	<b>Signature</b>	<b>Date signed</b> / /
<b>Attorney 2</b>	<b>Signature</b>	<b>Date signed</b> / /
<b>Attorney 3</b>	<b>Signature</b>	<b>Date signed</b> / /
<b>Attorney 4</b>	<b>Signature</b>	<b>Date signed</b> / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

Please (✓) one of the options below:

- I have attached valid Power of Attorney documentation<sup>2</sup>.
- I have previously supplied a valid Power of Attorney document to Brighter Super.

Now you have completed this form and signed the declaration, please send it to us by:

**Preferred Method**

**Website** (Secure file upload)  
[brightersuper.com.au/contact-us](http://brightersuper.com.au/contact-us)

**Alternative Options**

**Email** (scanned copy)  
[benefits@brightersuper.com.au](mailto:benefits@brightersuper.com.au)

**Post** Brighter Super  
GPO Box 264  
Brisbane Qld 4001



<sup>2</sup> For a Power of Attorney (PoA) to be accepted, we require the forms to be posted through to us at GPO Box 264, Brisbane QLD 4001. Please ensure your documents have been certified on each page, and you have included certified ID for the attorney(s) nominated in the PoA.