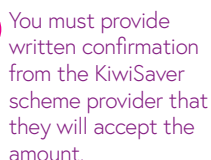


Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. If you have any questions, please contact our Member Support Team on **1300 650 873** (or **+61 3 9131 6373** from outside Australia).

* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

For more information on this step, see 'Proof of identity' in the **Notes** section.

☐ certified copy of an eligible document to confirm my residential address in New Zealand, as outlined in the 'Proof of identity' section.



Step 3: Fund details

KiwiSaver scheme provider*

[illegible]

KiwiSaver scheme phone number*

[illegible]

KiwiSaver scheme address*

[illegible]

Suburb

[illegible]

State

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Postcode

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KiwiSaver scheme account number*

[illegible]

Member Inland Revenue Department (IRD) number*

[illegible]

KiwiSaver scheme registration number*

[illegible]

Details of your KiwiSaver scheme

- To transfer to a KiwiSaver scheme, please provide all information relating to the KiwiSaver, including your Member Inland Revenue Department (IRD) number.
- We require written confirmation from the KiwiSaver scheme provider that they will accept the amount.
- To make multiple transfers please provide the details of each additional superannuation fund on a separate form.

- To transfer to a KiwiSaver scheme, please provide all information relating to the KiwiSaver, including your Member Inland Revenue Department (IRD) number.
- We require written confirmation from the KiwiSaver scheme provider that they will accept the amount.
- To make multiple transfers please provide the details of each additional superannuation fund on a separate form.

Step 4: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** (or **+61 3 9131 6373** from outside Australia) or visit **[aware.com.au/privacy](https://www.aware.com.au/privacy)** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

Step 5: Declaration

I request and consent to the transfer of superannuation as described above and authorise Aware Super Pty Ltd (as trustee) to give effect to this payment. By signing this request, I am making the following statements:

- I declare that I have fully read this form and the explanatory notes and the information completed is true and correct.
- I have read, understood and accept the privacy policy.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply or any other information about the effect this transfer may have on my benefits and do not require any further information.
- I discharge the trustee from all further liability in respect of the benefits paid and transferred to my nominated KiwiSaver scheme.
- I understand that if I intend to claim a tax deduction for any personal contributions I have made to the Fund in the current financial year, I must provide a Notice of intent to claim or vary a deduction for personal superannuation contributions form to the trustee before I close the account into which I have made the personal contributions.
- I acknowledge that the trustee may deduct tax (where applicable) from my benefit.
- I understand that any amount/s I have invested in the Term Deposit Option cannot be accessed before the maturity date. Only under special circumstances and at Trustee discretion, may the trustee allow a term deposit to be terminated early. I understand there may be extra costs associated with an early termination, such as a reduction in interest accrued.
- I understand that unit prices will apply to the amount transferred on the day the transfer is processed from each investment option.
- I understand that any insurance cover I may have through my Fund membership will cease upon full transfer of my benefit.
- I acknowledge that the trustee may require additional proof of identity in certain circumstances under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.
- I understand that this transfer request is irrevocable.



Please sign and date form here.

Signature*

Date signed* (DD-MM-YYYY)

D	D	M	M	Y	Y	Y	Y
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Step 6: Checklist

I have:

- ☐ completed the attached statutory declaration, and had it certified by a qualified witness
- ☐ provided certified copies of proof of your identification
- ☐ provided a certified copy of an eligible notice confirming your New Zealand residential address
- ☐ signed the declaration
- ☐ attached confirmation from the KiwiSaver scheme provider that they will accept the amount



Post the form to this address.

Step 7: Where to post your completed form

Please post the completed form to:

Aware Super
GPO Box 89
MELBOURNE VIC 3001
AUSTRALIA

In case you need any further assistance, please contact our Member Support Team on **1300 650 873** (or **+61 3 9131 6373** from outside Australia).

Statutory declaration

Oaths and Declarations Act 1957



Please complete all details in BLOCK letters and have your signature witnessed by an eligible witness, as outlined in the **Notes**.

I, (full name)

Middle name

Last name

of (NZ residential address)

Suburb*

State*

Postcode*

Occupation

make the following declaration under the *Oaths and Declarations Act 1957*:

- I have emigrated permanently to New Zealand.
- I have opened a KiwiSaver scheme account and request and consent to the payment of the whole of the transfer benefit to that account.
- I understand that the benefit paid to my account in the KiwiSaver scheme will be in Australian dollars.
- The KiwiSaver scheme provider will accept the benefit payment.
- I do solemnly and sincerely declare that the information provided by me in the *Trans-Tasman Transfer* form is true and correct.

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

Declared at (address)

Date

Signature of declarant before me

Signature of witness

Full name of witness*

Qualification of witness*

Address of witness *

Stamp of witness

Important information

If concessional contributions such as superannuation guarantee (SG) or salary sacrifice have been paid into your account during the financial year, and we do not have your tax file number (TFN), we will be required to deduct extra tax at 30 June, or at the date you exit the Fund. Once you exit the Fund you cannot claim a refund of the tax deducted.

Statutory Declaration

Declaration forms should be signed in front of a person allowed to witness statutory declarations. This includes New Zealand Justice of the Peace, Notary public, Judges, Judges of the Maori Land Court and Lawyers.

For a full list go to www.legislation.govt.nz/act/public/1957/0088/latest/whole.html#DLM314584

Proof of identity

Have you changed your name?

If you have changed your name, you must also provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificate cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your maiden name and your married name.

Purpose	Suitable linking documents
Change of name	Certified copy of marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Certified copy of guardianship papers or Power of Attorney

If you are providing a linking document due to a change of name or you are signing on behalf of another person, you must also provide certified copies of proof of identification documents as outlined. If both documents are not provided, your transfer will be delayed until correct documentation is provided.

Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

Proof of identity

Any change of name, correction to your date of birth, update to your mobile number or providing an overseas address we have recorded for you must be supported by **proof of identity** (POI) documentation.

Providing certified proof of your identity is a three-step process

- 1 Collect your originals**
Collect your proof of identity document(s). We have listed the documents you can use below.
- 2 Photocopy your originals**
- 3 Have your copies certified**
Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

Either:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.[^]
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier[^]

Or:

One certified document from this list:

- A birth certificate issued by a state or territory of Australia, by a foreign government, or by the United Nations or an agency of the United Nations[^]
- A citizenship certificate issued by the Commonwealth or a foreign government[^]
- A current Centrelink pension card that entitles you to receive financial benefits

AND

One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- If you're under 18, you can provide a student card, or a letter from a school principal. The letter must include the date it was issued (within three months of providing your proof of ID), your name, residential address and the dates you attended the school.

[^] If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "Certified to be a true copy of the original seen by me", followed by their signature, printed name, address (personal or professional), qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date. In the case of a multiple page document, the authorised certifier must certify all pages by repeating the above steps on each page and including the numbering of each page (1 of 25).

If you are in Australia

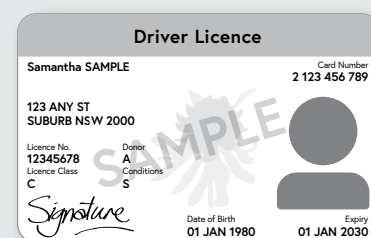
The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at www.ag.gov.au.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

Samantha Sample has provided a copy of her identification. It includes her **signature, full name, date of birth and current residential address.**

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



I certify that this document is a true copy of the original.

K Anderson

Name: Kate Anderson

Address: 6 Some St Suburb NSW 2000

Qualification: JP

Registration no: 123456

Date: 1 March 2023



If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

Overseas residents

If you change your address to an overseas address, reside overseas or direct Aware Super to make your payment to an overseas address, you must provide verification proof.

What proof of identity information must be provided?

A passport issued by the Commonwealth,

OR

A passport or a similar document issued for the purpose of international travel, that:

- a. contains a photograph and the signature of the person in whose name the document is issued
- b. is issued by a foreign government, the United Nations or an agency of the United Nations, and
- c. if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

AND

one of the following:

- a. a licence or permit issued under the law or equivalent authority of a foreign country for the purpose of driving a vehicle that contains a photograph of the person in whose name the document is issued and contains their residential address, or
- b. a notice that:
 - was issued to an individual by a local government body or utilities provider within the preceding three months
 - contains the name of the individual and his or her residential address, and
 - records the provision of services by that local government body or utilities provider to that address or to that person.

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