

How to transfer your super to New Zealand (Trans Tasman Portability)

ARE YOU ELIGIBLE?

In order to be eligible to transfer your super to a KiwiSaver Scheme in New Zealand, you must:

- have left Australia to permanently live in New Zealand; **and**
- be a current member of a KiwiSaver Scheme

NOTE:

1. If you are a temporary resident of Australia, different rules may apply.
2. If your benefit includes an untaxed element or is a defined benefit interest, you will not be eligible.

Please contact the Helpline on 1300 134 433 if you have any questions.

IMPORTANT INFORMATION

- The whole of your benefit must be transferred to the nominated KiwiSaver Scheme in New Zealand. Payment of part of your benefit is not permitted under any circumstances.
- You will be able to access your Australian super when you reach age 60 and satisfy the Australian definition of retirement at that age. Your KiwiSaver portion (the amount accumulated in New Zealand, together with earnings on your Australian super) can only be accessed when you reach the New Zealand retirement age of 65.
- The Trustee recommends that you seek independent professional financial advice before proceeding.

WHAT YOU NEED TO PROVIDE

1. An original copy of a letter of compliance from your KiwiSaver Scheme that:

- (a) confirms the Scheme will accept payment and
- (b) provides details of the Scheme's bank account (refer Step 5 on the Trans Tasman Portability form for full details).

2. Certified proof of identity.

What are the requirements?

You will need to provide a **certified copy** of either your current driver's licence or current passport **OR** your birth certificate **AND** one document from list two.

List One	List Two
Birth certificate	New Zealand utility bill (electricity, gas or water bill) issued in the last 3 months
	New Zealand landline phone bill issued in the last 3 months (mobile phone bills will NOT be accepted)

Who can certify documents outside Australia?

People with the below occupations can certify your document in New Zealand:

- a Justice of the Peace
- an employee of the police who holds the office of constable
- notary public
- registered medical doctor
- registered teacher
- minister of religion
- lawyer
- chartered accountant
- Kaumātua
- New Zealand Honorary consul
- Member of Parliament

In addition, they mustn't be:

- related to you
- your spouse or partner
- a person who lives at the same address as you

How to certify your documents

The authorised person needs to:

- a. Compare the photocopy to the ORIGINAL
- b. Include the following details on the photocopy
 - Write "Certified true copy" on the photocopy; and
 - Write their name, qualification and registration number (if applicable); and
 - Sign and date the photocopy

NOTE: people authorised to certify documents may differ to those authorised to witness your statutory declaration.

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3. Proof of New Zealand Residency

A copy of a New Zealand utility bill (electricity, gas or water bill) or landline phone bill issued in the last 3 months OR a copy of a tenancy/leasing agreement for a New Zealand property in which you reside.

4. A completed statutory declaration witnessed by an eligible person.

You can provide a New Zealand OR an Australian³ statutory declaration. A copy of each type of declaration is attached at the end of this form.

Witness to a statutory declaration

A statutory declaration must be witnessed by a person who is eligible to do so under the law in either Australia or New Zealand. The people who can witness your statutory declaration in New Zealand will generally be different to those who can certify your proof of identity documents (refer to item 2 on previous page). The table below is provided as a guide only.

For a full list of people who can witness a statutory declaration, please refer to the following websites:

- **New Zealand** – www.legislation.govt.nz/act/public/1957/0088/latest/whole.html
- **Australia** – www.ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx

	Under 65	65 to under 75	75+
New Zealand Notary Public ¹	✓	✓	✗
Australian Notary Public	✓	✗	✓
Person enrolled as a barrister and solicitor of the High Court of New Zealand	✓	✓	✗
New Zealand Justice of the Peace	✓	✓	✗
Consular or Diplomatic Officer at the Australian High Commission in Wellington ²	✓	✗	✓
Consular or Diplomatic Officer at the Australian Consulate-General in Auckland ³	✓	✗	✓

Notes and further information:

¹ If you elect to use a **New Zealand statutory declaration**, a Notary Public can also certify your proof of identity documents.

² The **Australian statutory declaration** must be signed in front of the Consular or Diplomatic Officer and cannot be witnessed by mail. It is not necessary to make an appointment, but you will be charged a small fee. You will be required to present current photo ID, showing both your current name and signature. The Consular or Diplomatic Officer can also certify your proof of identity documents. Please refer to the Australian High Commission website for further information – www.newzealandembassy.gov.au

³ If you complete an Australian statutory declaration in Australia, please refer to the Australian website in point 4 above, for a full list of people who can witness your Australian statutory declaration in Australia.

REI Super 50 YEARS

If you need help

➤ PART 1: YOUR DETAILS

▶ PART 2: DETAILS OF YOUR PREVIOUS AUSTRALIAN ADDRESS

PART 3: ATTACH DOCUMENTATION IF YOUR PERSONAL DETAILS HAVE CHANGED

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➤ PART 6: TRANS TASMAN DOCUMENTARY EVIDENCE AND CHECKLIST

Please use the following check list to assist you in providing the correct documents. Please note that if we do not receive the correct documents your request will be delayed.

- ☐ Letter of compliance from your KiwiSaver Scheme confirming they will accept the transfer
- ☐ Bank account details as follows:
 - ☐ Bank SWIFT code
 - ☐ Bank name and address
 - ☐ Beneficiary name
 - ☐ Beneficiary address
 - ☐ Beneficiary account number
- ☐ Certified proof of identity documents
- ☐ Evidence of your permanent residence at a New Zealand address, for example:
 - ☐ a copy of an electricity, gas, water bill or landline phone bill issued in the last 3 months; or
 - ☐ a copy of a tenancy/leasing agreement for a New Zealand property
- If you have used a New Zealand statutory declaration
 - ☐ The statutory declaration has been witnessed by a person authorised to take statutory declarations in New Zealand under the NZ Oaths and Declarations Act 1957
- If you have used an Australian statutory declaration:
 - ☐ The statutory declaration has been witnessed by a person who is able to witness statutory declarations under the Australian Statutory Declarations Act 1959

Your Privacy

The Fund is administered by us along with our service provider, SS&C Bluedoor Pty Limited (SS&C). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1300 13 44 33**.

Our Privacy Policies are available to view at reissuper.com.au/privacy-policy or you can obtain a copy by contacting us on **1300 13 44 33**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government

authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to SS&C's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 13 44 33** or write to our Privacy Officer **PO Box 832, Newcastle NSW 2300**.

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> PART 7: SIGN THE FORM

By signing this form:

- I understand the information contained in this form will be relied upon and used by the trustee to process my Trans Tasman Portability request. It may be disclosed to the administrator, government agencies, my employer and other parties as required, including the trustee of my nominated KiwiSaver Scheme.
- I have read and understood the Privacy Policy which is available at reisuper.com.au/privacy-policy and I consent to my personal information being collected and used by REI Super in accordance with this privacy policy.
- I request and consent to the payment of the whole of my withdrawal benefit to my nominated KiwiSaver Scheme.
- I understand there may be a delay in payment if my details have changed or if I do not provide the correct documents.
- I can access my personal information by contacting my superannuation fund's Privacy Officer.

Signature

X

Date

/

/

> READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:

Post: REI Super, PO Box 832, Newcastle NSW 2300
Email: admin@reisuper.com.au.

> WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.

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> NZ STATUTORY DECLARATION

NOTE: You only need to complete and return one statutory declaration.
This statutory declaration must be signed in New Zealand by an authorised person. Refer to the Fact Sheet attached.

Full name of person making the declaration
I,
Address
of
Occupation

request the transfer of my total withdrawal benefit from REI Super to my nominated KiwiSaver Scheme.

I solemnly and sincerely declare that:

- Date
1. I permanently emigrated from Australia to New Zealand on / / and;
2. all the information I have provided in this form regarding my application is true and correct and I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declaration Act 1957.

Signature of member

Declared at:

Location Date / /

Before me,

Name*

Please specify office held

Signature

* Please refer to the following website for further information on who can witness a statutory declaration under the NZ Oaths and Declarations Act 1957 – www.legislation.govt.nz/act/public/1957/0088/latest/whole.html

How to transfer your super to New Zealand (Trans Tasman Portability) cont...

▶ AUSTRALIAN STATUTORY DECLARATION

NOTE: You only need to complete and return one statutory declaration.

This statutory declaration can be made before a person who is able to witness statutory declarations under the Australian Statutory Declarations Act 1959. This includes an Australian Consular or Diplomatic Officer at the Australian High Commission in Wellington, or at the Australian Consulate-General in Auckland. **New Zealand Justices of the Peace, solicitors etc. are unable to witness this statutory declaration.**

Commonwealth of Australia - STATUTORY DECLARATION - Statutory Declarations Act 1959

Full name of person making the declaration

I,

Address

of

Occupation

make the following declaration under the Statutory Declarations Act 1959:

Date (DD-MM-YYYY)

1. I permanently emigrated from Australia to New Zealand on / / and;

2. all the information I have provided in this form regarding my application is true and correct. I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this declaration are true in every particular.

Signature of person making the declaration

X

Declared at:

Place

Date (DD-MM-YYYY)

/ /

Before me,

Full name of person before whom the declaration is made (in printed letters)

Qualification

Address

Mobile phone (optional)

Home phone (optional)

()

Email (optional)

Signature of member

X

NOTES:

1. A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years — see section 11 of the Statutory Declarations Act 1959.

2. Chapter 2 of the Criminal Code applies to all offences against the Statutory Declarations Act 1959 – see section 5A of the Statutory Declarations Act 1959.

3. Please refer to the following website for further information on who can witness an Australian statutory declaration – www.ag.gov.au/Publications/Pages/Statutorydeclarationsignatorylist.aspx

