

Transfer your UniSuper account to KiwiSaver

This fact sheet explains how to transfer your UniSuper account to a KiwiSaver scheme provider.

Eligibility

To transfer your UniSuper account to KiwiSaver, you must have permanently emigrated from Australia to New Zealand.

If you think you may return to Australia at any stage, you may want to consider leaving your Australian super benefit with us. If you're unsure, simply call us on **+61 3 8831 7901** or **1800 331 685** if calling from Australia.

How will your super be transferred?

Accumulation 1, Accumulation 2 or Personal Account members can transfer balances to a chosen KiwiSaver scheme. Your entire balance will be transferred and your UniSuper account will be closed. Your entire balance will be sent electronically in Australian dollars using the details provided by your KiwiSaver Scheme. Your KiwiSaver scheme provider is responsible for converting the sum to New Zealand dollars.

If you're a Defined Benefit Division (DBD) member or have a Flexi Pension, you're unable to transfer your benefit under these rules. You can however choose to transfer your defined benefit to accumulation super when you leave your job, or close ('commute') your pension—the lump sum will then be transferred to your chosen KiwiSaver scheme. Transferring your defined benefit or commuting a pension is a complex decision.

You should check whether transferring your super will mean any benefits such as insurance cover will cease. We encourage you to seek advice from a qualified financial adviser before making a decision. You can contact UniSuper Advice on **1800 823 842**.

How to transfer to KiwiSaver

STEP 1: COMPLETE THE APPLICATION FORM

Complete the attached Transfer your UniSuper account to KiwiSaver form and make sure you complete all mandatory fields.

STEP 2: PROVE YOUR IDENTITY

You can prove your identity by providing certified proof of identity (POI) along with this form. For more information read the *Your guide to proof of identity* fact sheet. Please note: you're unable to prove your identity electronically for KiwiSaver transfers.

STEP 3: PROVIDE SUPPORTING DOCUMENTATION

You'll also need to provide the following documents:

- proof of residence in New Zealand
- a signed Australian or New Zealand statutory declaration stating you have permanently immigrated to New Zealand
- proof that you've an active KiwiSaver scheme account (e.g. welcome letter from KiwiSaver provider or KiwiSaver benefit statement)
- written confirmation from your KiwiSaver scheme provider that they'll accept the transfer.

STEP 4: SEND YOUR FORM AND SUPPORTING DOCUMENTATION TO UNISUPER

Send your documents together with your completed form and statutory declaration to:

UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000
AUSTRALIA

Or email them to enquiry@unisuper.com.au.

Proof of New Zealand residence

You need to provide proof of residence in New Zealand as part of your transfer application. If the document you've used to prove your identity (driver licence or passport) doesn't include your current New Zealand address, you'll need to provide additional supporting documentation that includes your address. Examples include:

- a utility bill
- a council rate notice
- a bank statement.

Your proof of identity documents must be certified.

Where can I make statutory declarations in New Zealand?

AUSTRALIAN STATUTORY DECLARATIONS

These can be made before a person who is able to witness Commonwealth statutory declarations under the Australian *Statutory Declarations Act 1959* and *Statutory Regulations 1993*.

This includes an Australian Consular or Diplomatic Officer at the Australian High Commission in Wellington, or the Australian Consulate General in Auckland.

Simply use Section 5 of the attached *Transfer your UniSuper account to KiwiSaver* form to make your Australian statutory declaration.

Important information

It's important to remember that authorised New Zealand individuals can't witness an Australian statutory declaration.

NEW ZEALAND STATUTORY DECLARATIONS

We can also accept New Zealand statutory declarations made under New Zealand's *Oaths and Declarations Act 1957*. Please attach your completed statutory declaration to your completed *Transfer your UniSuper account to KiwiSaver* form before sending it to us.

Your checklist

- I have opened a KiwiSaver scheme account with an authorised provider.
- I have written confirmation from my KiwiSaver scheme provider that they'll accept the payment.
- I have completed the *Transfer your UniSuper account to KiwiSaver* form.
- I have given UniSuper the KiwiSaver scheme's name and account number to which my super will be paid.
- I have provided proof of identity, proof of residence in New Zealand as well as an Australian or New Zealand statutory declaration witnessed by an authorised person.
- I have attached proof of an active KiwiSaver account.

Send your documents together with your completed form and statutory declaration to:

UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000
AUSTRALIA

Or email them to enquiry@unisuper.com.au.

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at April 2022 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850
Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806
Date: May 2022 UNIS00F113 0522

Transfer your UniSuper account to KiwiSaver



Use this form to transfer all of your UniSuper account to a complying KiwiSaver scheme account. You must transfer your full balance—partial transfers are not available.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, please call 1800 331 685.

By completing this form you are requesting to transfer all of your UniSuper account balance to a complying KiwiSaver account. Before submitting this form, please ensure that your chosen KiwiSaver account can accept the payment.

SECTION 1 MEMBER DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required.

UniSuper member number

If you're unsure of your member number, refer to your most recent UniSuper correspondence or call us on +61 3 8831 7901 or 1800 331 685 if calling from Australia. If you have multiple UniSuper accounts, you must complete a separate form for each account you would like to transfer.

Title

 Mr Mrs Ms Dr Professor Other

Surname

Given name

Date of birth (DD/MM/YYYY)

Daytime contact number

Current New Zealand address (not PO Box)

Suburb/Town

Postcode

Country

New Zealand

Previous address held by UniSuper

Suburb/Town

State

Postcode

Country (if not Australia)

Postal address (PO Box if applicable)

Suburb/Town

State

Postcode

Country (if not Australia)



SECTION 2 FUND DETAILS

From	UniSuper Limited	
Fund telephone number	1800 331 685	
Australian Business Number (ABN)	54 006 027 121	
Superannuation Product Identification Number (SPIN)	UNI0001AU	
To: (receiving fund)		
Your New Zealand Inland Revenue Department (IRD) number		
KiwiSaver scheme name		
KiwiSaver registration number		
Kiwi Saver phone number		
KiwiSaver membership account number		
KiwiSaver scheme postal address		
Suburb/Town		Postcode

If you have multiple UniSuper accounts, you must complete a separate form for each account you wish to transfer.

SECTION 3 PROOF OF IDENTITY AND PROOF OF RESIDENCY IN NEW ZEALAND CHECKLIST

I have:

Attached a certified copy of my proof of identity.

AND

Completed either the Australian statutory declaration attached to this form or attached a New Zealand statutory declaration, stating that I have permanently immigrated to New Zealand.

AND

Attached proof of residence in New Zealand showing my address.

SECTION 4 AUTHORISATION

► Please read the following before you sign the form..

- I declare that I have read the *Transferring your UniSuper account to KiwiSaver* fact sheet and the information I have provided on this form is correct.
- I authorise UniSuper to process my transfer as specified on this form.
- I understand that my UniSuper account will close and any Death, Total & Permanent Disablement and Income Protection cover I have will end.
- I consent to the transfer of my entire super balance from UniSuper to my KiwiSaver scheme account.
- I have permanently immigrated to New Zealand.
- My KiwiSaver scheme provider can accept this transfer.
- I understand that, from time to time UniSuper may contact me to request additional information and to verify my instructions on this form.

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

SECTION 5 STATUTORY DECLARATION

▶ Please complete the following Statutory Declaration. Skip this section if you're attaching a New Zealand statutory declaration to this form.

Commonwealth of Australia Statutory Declaration – *Statutory Declarations Act 1959*

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr	<input type="checkbox"/> Professor	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>						
Given name	<input type="text"/>						
Residential address (not PO Box)	<input type="text"/>						
Suburb/Town	<input type="text"/>						
State	<input type="text"/>					Postcode	<input type="text"/>
Occupation	<input type="text"/>						

I make the following declaration under the *Statutory Declarations Act 1959* that:

1. I have permanently immigrated to New Zealand.
2. All supporting documents provided with the application are true and correct.
3. 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 Declaration Act 1959*, and I believe that the statements in the declaration are true in every way.

Signature of person making the declaration

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>DD</i>	<i>MM</i>	<i>YYYY</i>

Signature of the person before whom the declaration is made

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>DD</i>	<i>MM</i>	<i>YYYY</i>

Declared at (place)

On the date

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>DD</i>	<i>MM</i>	<i>YYYY</i>

before me (complete full name, qualification and address of the person before whom the declaration was made below)

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr	<input type="checkbox"/> Professor	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>						
Given name	<input type="text"/>						
Qualification	<input type="text"/>						
Residential address (not PO Box)	<input type="text"/>						
Suburb/Town	<input type="text"/>						
State	<input type="text"/>					Postcode	<input type="text"/>
Daytime contact number	<input type="text"/>						

Note 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 four years – see SECTION 11 of the *Statutory Declarations Act 1959*.

Note 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*.

**Return your completed and signed form
and supporting documents to:**

UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000
Australia

Or email them to enquiry@unisuper.com.au.

Need help?

- Email enquiry@unisuper.com.au
- Call **1800 331 685**.