



Transfer your UniSuper account to KiwiSaver



What this fact sheet covers



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

Who is this fact sheet for?



Members who have permanently moved from Australia to New Zealand and want to transfer their superannuation to an authorised KiwiSaver provider.

Are you eligible to transfer your UniSuper account to KiwiSaver?

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. A cheque will be drawn in Australian dollars and 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, or stop ('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 logging into your account at **unisuper.com.au**, or by providing certified proof of identity (POI). For more information read the *Your guide to proof of identity* fact sheet.

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), and
- 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

How can I prove my identity?

You can quickly and easily prove your identity online—you'll know as soon as your identity gets verified.

You can also send us certified copies of your ID. For more information, read the *Your guide to proof of identity* fact sheet.

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

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 July 2019 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 No. 492806

Date: July 2019 UNIS00F113 0719

Your guide to proof of identity



We take looking after your retirement savings very seriously—which is why you need to prove your identity (ID) before making withdrawals or other important changes to your account.

Verify your identity online

Proving your identity online is quick and easy—you'll know as soon as your identity gets verified. Log in at unisuper.com.au/memberonline to get started. Only Australian residents with Australian documents currently living in Australia can verify their identity through MemberOnline.

You'll need one or more of the following valid documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card
- State and Federal electoral roll details.

Make sure you've updated your current personal details with relevant government agencies before you begin the process of verifying your identity online. We use online government and public databases to securely verify your identity.

Or send us certified copies of your ID

You can also send us certified copies of your ID. The following guide explains the types of documents we can accept and how to ensure they're correctly certified.

ALLOW US TO VERIFY YOUR IDENTITY

In some cases and on some of our forms, we can verify your identity on your behalf if the document(s) you provide haven't been certified correctly or can't be read. All you need to do is give us consent by ticking the box on the applicable form—and we'll try to verify your identity electronically using those documents. We'll let you know if the process wasn't successful.

Why provide your TFN?

Giving us your tax file number (TFN) means we can process rollover and transfer requests to another super fund without additional proof of identity. If your TFN can't be validated, or you want to transfer to a self-managed super fund or organise a benefit payment, you'll still need to give us certified copies of your ID.

Visit unisuper.com.au/memberonline to provide your TFN online.

STEP 1: COLLECT ACCEPTABLE DOCUMENTS

We'll accept either one document from List A or two documents from List B.

LIST A

A CERTIFIED COPY OF A:

- current driver licence
- current passport (Australian passports that haven't expired more than two years ago are also acceptable)

LIST B

A CERTIFIED COPY OF A:

- birth certificate or birth extract
- Australian citizenship certificate
- a pension card issued by Centrelink that entitles the person to financial benefits.

AND:

- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address
- letter from Centrelink regarding a government assistance payment
- rates notice from local council (less than 12 months old) containing your name and residential address
- electricity, gas or water bill dated within the past three months that contains your name and residential address.

STEP 2: CERTIFY YOUR DOCUMENTS

Take your original document(s) and a clear photocopy of both sides of the original document to an authorised person.

Your ID must be properly certified

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
 - signature
 - printed name
 - qualification (e.g. Magistrate), and
 - date.

If you've changed your name or are signing on behalf of another member, prove the 'link' between you and the name change, or other person—use a certified copy of one of the following documents as well as your other certified ID.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	→ Marriage certificate → Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages
Signing on behalf of another member	→ Power of Attorney → Guardianship papers

When having your documents certified, remember:

- All pages must be certified.
- The copy of the document must be certified—not on a separate page attached to the document.
- Certified copies of your documents must have an original signature.
- Faxed or emailed copies won't be accepted.
- Documents not written in English must be accompanied by an English translation prepared by an accredited translator.
- Documents certified more than a year ago won't be accepted.

Who can certify your documents

Some of the people authorised to certify IDs include:

1. A person currently licensed or registered under a State or Territory law to practise in one of the following occupations:
 - Architect
 - Chiropractor
 - Conveyancer
 - Dentist
 - Financial adviser or financial planner
 - Legal practitioner
 - Medical practitioner
 - Midwife
 - Nurse
 - Occupational therapist
 - Optometrist
 - Patent or Trade marks attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Veterinary surgeon.
2. One of the following persons:
 - Teacher employed full-time at a school or tertiary education institution

- Agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service with, an office supplying postal services to the public
- Bank, building society, credit union or finance company officer with two or more years of continuous service
- Clerk, Master, Registrar or Deputy Registrar of a court
- Judge of a court or a Magistrate
- Justice of the Peace
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, the Institute of Public Accountants or the Association of Taxation and Management Accountants, or a Fellow of the National Tax Accountants' Association
- Notary public, and
- Police officer.

Visit the [Attorney General's website](#) for a full list of who can certify documents.

Using foreign documents?

These must be translated by an accredited translator (if they're not in English) and you must have the translated copies correctly certified by a person listed in the 'Members residing overseas' section below.

Members residing overseas

If you live overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Employee of the Commonwealth or the Australian Trade Commission who is authorised and exercising his or her function in a country or place outside Australia.
- A person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by a someone licensed or registered to practise outside of Australia in an occupation listed above, or who holds a position in a foreign country—except for a foreign notary public.

When will my form be processed?

If you've provided a correctly completed form (and any certified ID or other paperwork required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3 - 5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

Returning your form

- Mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000
- Email 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 November 2017 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.

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Fund: UniSuper, ABN 91 385 943 850

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Date: February 2019 UNIS000F80 0219

Transfer your UniSuper account to **KiwiSaver**



AVOID PROCESSING DELAYS

We make important changes to our forms at times. Check you're using the latest version by comparing the issue date at the bottom of this page with the version at unisuper.com.au/forms.

Use this form to transfer all of your UniSuper account to a complying KiwiSaver scheme account. Unfortunately we can't transfer partial balances.

Important information

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.

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at unisuper.com.au or by calling us on **1800 331 685**.

SECTION 1 — Member details

Please use BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross where required **X**

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(s)

Date of birth (DDMMYYYY)

What number do you want us to call you on if we have a question regarding this form? (between 9am to 5pm Melbourne-time)

Email address

@

Current New Zealand address (not PO Box)

Suburb/Town

State Postcode

NEW ZEALAND

form continues



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 Mr Mrs Ms Dr Professor

Other

Surname

Given name

Street address

Suburb/Town

State Postcode

Occupation

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 the person making the declaration

Date (DDMMYYYY)



NEED HELP?

For more information:

- email enquiry@unisuper.com.au, or
- call **1800 331 685**.

SECTION 5 — Continued

Signature of the person before whom the declaration is made

Date (DDMMYYYY)

Declared at (place)

On the date (DDMMYYYY)

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

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Qualification

Street address

Suburb/Town

State Postcode

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:

UniSuper
Level 1, 385 Bourke Street
Melbourne VIC 3000
AUSTRALIA