

# TRANSFER FROM LOCKED-IN ACCOUNT TO KIWISAVER

---

## MEMBER DETAILS:

Name: \_\_\_\_\_ Title: Mr / Mrs / Ms / Miss  
Surname Given names (Please circle one)

Member No.: \_\_\_\_\_ Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Contact Phone No: ( ) \_\_\_\_\_

Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

**IMPORTANT:** This form is only for a member who has a Locked-in Account in the NZAS Retirement Fund and wants to transfer some or all of the balance in that account to a KiwiSaver scheme.

## MEMBER TO COMPLETE

### Transfer to KiwiSaver scheme

I wish to transfer (*select one only*):

the **full** balance in my Locked-in Account in the NZAS Retirement Fund

**or**

the sum of \$\_\_\_\_\_ from that Locked-in Account

to the following KiwiSaver scheme:

KiwiSaver scheme name: \_\_\_\_\_

Member number in the KiwiSaver scheme: \_\_\_\_\_

**I understand that before my application to transfer all or any of my Locked-In Account balance to KiwiSaver can be processed I am required to complete the statutory declaration.**

*Please sign and date below, then turn the page over for the Statutory Declaration.*

**Please note this application is subject to confirmation from your KiwiSaver scheme provider. Please allow at least fifteen working days for this application to be processed.**

---

Member's signature: \_\_\_\_\_ Date: \_\_\_\_\_

---

**Please return your completed form to the Human Resources Officer, NZAS**

# STATUTORY DECLARATION

Please complete this section in front of a person authorised (see below) to take a statutory declaration.

I, \_\_\_\_\_  
Full name

of \_\_\_\_\_  
Address and occupation

request the transfer to my KiwiSaver account of all or part of my Locked-in Account balance (which I acknowledge may include member tax credits) as shown on the preceding page. I solemnly and sincerely declare that:

- my principal place of residence has been in New Zealand throughout the period since a locked-in account was established for me in the Fund;

**or**

- during the period since a locked-in account was established for me in the Fund, my principal place of residence has been in New Zealand except during the period(s) set out below:

Start date: \_\_\_\_\_ End date: \_\_\_\_\_

Start date: \_\_\_\_\_ End date: \_\_\_\_\_

- all the information I have provided in this form is true and correct.

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

Signature of member: \_\_\_\_\_

Declared at: \_\_\_\_\_ this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_  
Location Day Month Year

Before me (please print): \_\_\_\_\_  
Person authorised to take statutory declaration\* Please specify office held

Signature of witness: \_\_\_\_\_

\* a Justice of the Peace, or solicitor, or notary public, or other person authorised to take a statutory declaration.