

# APPLICATION TO WITHDRAW FUNDS FROM RETIREMENT ACCOUNT

**Important note:** This form is for use only by a member who is no longer employed by NZAS and who has continued membership as a retirement account holder (and it relates only to that account).

If you are no longer employed by NZAS and you also have a locked-in account, you can only withdraw funds from that account if you are aged 65+ (or you qualify on another basis such as serious illness). To do so, obtain and complete the appropriate form from [www.nzasretirementfund.com](http://www.nzasretirementfund.com) (these include NZAS13A - Former Employee Aged 65+ - Application to Withdraw Funds from Locked-in Account).

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

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

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

Email Address: \_\_\_\_\_ Contact Phone No.: ( ) \_\_\_\_\_

## Select type(s) of withdrawal

Note: You can withdraw some or all of your retirement account balance at any time, but if you wish to make a partial withdrawal (whether as a lump sum or by way of a regular monthly withdrawal) then following each such withdrawal you must leave at least \$5,000 in the Fund.

If your Fund balance falls below that minimum amount, the full amount will be paid out, the account will be closed and you will cease to be a Fund member.

### Total withdrawal

I wish to withdraw my full retirement account balance.

Date funds required: \_\_\_/\_\_\_/\_\_\_

**or**

### Lump sum partial withdrawal

I wish to make a withdrawal of \$\_\_\_\_\_ from my retirement account.

Date funds required: \_\_\_/\_\_\_/\_\_\_

**or**

### Regular monthly withdrawals

Payments will be made around the 20<sup>th</sup> of each month.

I wish to make a regular monthly withdrawal of \$\_\_\_\_\_ from my retirement account.

## Deposit instructions

Please deposit this amount into my bank account. I **attach** (please tick one):

a pre-encoded bank deposit slip  a photocopy of a bank statement  an internet banking screenshot

**Nominated investment option (for partial withdrawal purposes)**

Only complete this section if you wish to make a partial withdrawal or regular monthly withdrawals **and** you invest in two or more investment options in the Fund **and** you wish to nominate which investment option you want the withdrawal amount(s) paid from.

If you are investing in one investment option only, please proceed to sign and date this form.

If you don't nominate an investment option, the funds will be withdrawn from your investment options in proportion to the percentage of your retirement account balance held in each investment option.

Please withdraw the funds from my savings in the following investment option (choose one):

- Cash investment option
- Conservative investment option
- Balanced investment option
- Growth investment option

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**Signature**

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**Please note that this form should be sent to Mercer (N.Z.) Limited at least five working days prior to the date funds are required.**

**Email** this form and copies of the required attachments to [NZASRF@mercer.com](mailto:NZASRF@mercer.com)

**Alternatively, post to:**

NZAS Retirement Fund  
c/o Mercer (N.Z.) Limited - Administration Manager  
PO Box 1849, Wellington 6140.

**IMPORTANT**

- Have you checked the form and ensured it has been completed correctly?
- Have you attached a copy of a pre-encoded bank deposit slip, bank statement or internet banking screenshot (in each case showing your name and bank account details)?