

## APPLICATION TO WITHDRAW FUNDS FROM LOCKED-IN ACCOUNT ON THE GROUNDS OF SERIOUS ILLNESS

You are entitled to withdraw some or all of your locked-in account if the Trustee is reasonably satisfied that you are suffering an illness, injury or disability:

- That results in you being **totally and permanently** unable to engage in work for which you are suited by reason of experience, education or training, or any combination of those things; or
- That poses a **serious and imminent** risk of death.

The information you provide in this form will be used by the Trustee to determine whether or not you meet the criteria for serious illness, as defined.

If you do not meet the requirements for a withdrawal on the grounds of serious illness, but your illness is causing significant financial hardship, you may still make a claim on the basis of significant financial hardship by completing the significant hardship claim form, available from Documents & forms on [realsuper.superfacts.co.nz](http://realsuper.superfacts.co.nz).

The Trustee will decide whether or not to approve your claim. The Trustee may require further information from you. If the Trustee approves your claim, you will be advised and payment will be made in accordance with your instructions.

### To apply for a serious illness withdrawal:

- Provide your personal details in Step 1
- Specify the amount you would like to withdraw in Step 2
- Complete and sign the declaration in Step 3 and have it witnessed.
- Ask your doctor to complete the medical assessment section of this form (Step 4)
- Please return your completed form (including the medical assessment) to: **The Human Resources Officer, NZAS**

**If there is insufficient space for you to provide all of the relevant information please indicate this on the application form and attach to this form the further information.**

### Step 1 – Complete your personal details

Name.....

Surname

Given Names

Home Address.....

Date of Birth..... IRD No: ..... Title Mr/Mrs/Ms/Miss (Please circle one)

**Important – The Trustee will only permit an early withdrawal for serious illness if they are satisfied that had you been a member of a KiwiSaver scheme, you would have been permitted under the KiwiSaver Act 2006 to make the relevant withdrawal.**

## Step 2 – Request for serious illness withdrawal

Give your reason/s for seeking a serious illness withdrawal:

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How much do you need?

Amount \$ \_\_\_\_\_ Or:  All available funds

## Step 3 – Statutory declaration

I,

Full name

Of

Town, city or district of residence and occupation

- Am suffering a serious illness.
- Request a serious illness withdrawal from my locked-in account.
- Agree to provide such further information as may be required by the Trustee in considering my application.

I solemnly and sincerely declare that to the best of my knowledge all the information I have provided in this form regarding my application is true and correct.

I further solemnly and sincerely declare that I have had my principal place of residence in New Zealand since a locked-in account in the Fund was established for my benefit or, if otherwise, I have detailed below the periods for which I had my principal place of residence in New Zealand since a locked-in account in the Fund was established for my benefit.

*Please detail below the periods for which you had your principal place of residence in New Zealand since a locked-in account in the Fund was established for your benefit:*

From: \_\_\_\_\_ To: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_

From: \_\_\_\_\_ To: \_\_\_\_\_

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

Signature

x

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

Before me (please print)

Justice of the Peace, or notary public, or solicitor of the High Court of New Zealand, or other person authorised to take statutory declarations

Signature

x



