

# EMPLOYEE TERMINATION FORM

Name: \_\_\_\_\_

Surname

Given Names

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

Home address: \_\_\_\_\_

Email: \_\_\_\_\_      Phone: \_\_\_\_\_

**NB: If you have a locked-in account you must complete Parts 1 and 2 of this form and if necessary, the statutory declaration overleaf. If you have only a standard account, do not complete either Part 2 or the statutory declaration.**

My account balances from the NZAS Retirement Fund are to be paid as follows: *(Please tick the appropriate box(es))*

## PART 1 - STANDARD ACCOUNT BALANCES

### Deposited into my bank account:

1.  A bank encoded deposit slip or  A copy of a bank statement printout showing my bank account details is attached.  A screen shot taken from the NZAS Payroll system.

**or**

### Transferred to a retirement account in the NZASRF:

2.  I have reached age 55 and wish to have my NZAS Retirement Fund standard account balances paid into a retirement account in my name.

**or**

3.  I have reached age 45, have 15 or more years of service with NZAS, and wish to have my NZAS Retirement Fund standard account balances paid into a retirement account in my name.

## PART 2 – LOCKED-IN ACCOUNT BALANCE

### Deposited into my bank account:

1.  I confirm that I have attained age 65 and completed five or more years' locked-in complying superannuation fund and/or KiwiSaver scheme membership. (Please allow up to 20 days for payment to allow Inland Revenue to process any member tax credits.) **I have also completed the statutory declaration overleaf and attached a bank encoded deposit slip or copy of a bank statement printout showing my bank account details.**

**or**

### Retained in the NZASRF:

2.  This option is only available if you have indicated above that your standard account balances are to be allocated to a retirement account.

**or**

### Transferred to the following KiwiSaver scheme:

3.  Select this option if you have not elected (or are not eligible<sup>1</sup>) to transfer your locked-in account balances to a retirement account in the NZASRF. If you do not provide this information, your locked-in account balances will be held in the NZASRF until Inland Revenue has allocated it to one of the default KiwiSaver schemes (and will be transferred to that scheme).

KiwiSaver scheme name: \_\_\_\_\_ Contact person: \_\_\_\_\_

Address: \_\_\_\_\_ Phone no.( ) \_\_\_\_\_

I am not, nor have I previously been, adjudicated bankrupt.

I am or have previously been adjudicated bankrupt. Details are attached.

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

**Please return your completed form to NZAS Human Resources**

<sup>1</sup> You are not eligible to transfer your locked-in account balances to a retirement account until you have attained age 65 and completed five years' membership of a locked-in complying superannuation fund and/or a KiwiSaver scheme

## STATUTORY DECLARATION

**Please complete this section in front of a person authorised to take a statutory declaration. The people legally authorised to take a statutory declaration are listed on the following page.**

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

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

request a withdrawal of all or part of my locked-in account balance, including any member tax credits, as shown overleaf.

I confirm that I have attained age 65 and completed five years' KiwiSaver and/or locked-in complying superannuation fund membership.

I solemnly and sincerely declare that:

- I am entitled to make this withdrawal;
- my principal place of residence has been in New Zealand during the period since a locked-in account was established for my benefit. *(If you did not reside principally in New Zealand for any period, please specify the periods: \_\_\_\_\_);* and
- all the information I have provided in this form regarding my application 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: \_\_\_\_\_

### IMPORTANT

- Have you checked the form and ensured it has been completed correctly?
- If you are having funds paid into your bank account, have you included a bank encoded deposit slip or copy of a bank statement showing your bank account details?
- If you are withdrawing funds from your locked-in accounts, have you signed the statutory declaration above?
- If applicable, has your witness signed and completed the statutory declaration?

**People who can witness a statutory declaration in New Zealand are:**

- (a) a person enrolled as a barrister and solicitor of the High Court; or
- (b) a Justice of the Peace; or
- (c) a notary public; or
- (d) the Registrar or a Deputy Registrar of the Supreme Court; or
- (e) the Registrar or a Deputy Registrar of the Court of Appeal; or
- (f) a Registrar or Deputy Registrar of the High Court or a District Court; or
- (g) some other person authorised by law to administer an oath; or
- (h) a member of Parliament; or
- (i) a person who-
  - (i) is a fellow of the New Zealand Institute of Legal Executives; and
  - (ii) is acting in the employment of a practising barrister and solicitor of the High Court; or
- (j) an employee of the New Zealand Transport Agency, authorised for that purpose by the Minister of Justice; or
- (k) an employee of Public Trust authorised for that purpose by the Minister of Justice; or
- (l) an officer in the service of the Crown or a local authority authorised for that purpose by the Minister of Justice.