



How to move your super to KiwiSaver.

Are you now living in New Zealand permanently?

If so, you may be thinking about moving your Australian superannuation to a Kiwi Saver account. While it is not a legal requirement, if you aren't planning on moving back to Australia, this transfer can make good sense.

It is not compulsory for you to transfer your Hostplus superannuation benefit to a KiwiSuper account when you move permanently to New Zealand. Before you make a decision, you should compare the differences between your Kiwi Super fund and Hostplus. When you transfer your Hostplus benefit to a KiwiSuper account any insurance you have with Hostplus will cease. In addition to considering the insurance implications you should you compare the fees. It is recommended that you seek independent financial advice before you make your decision.

The Trans-Tasman retirement savings portability scheme.

If you're an Australian or New Zealand citizen with super benefits in Australia, and you've made a permanent move to New Zealand, the Trans Tasman Retirement Savings Portability Scheme makes it easy to consolidate your super into an authorised Kiwi Saver Fund.

Moving to a KiwiSaver fund.

As your super is leaving the Australian superannuation system and being sent overseas, Hostplus is legally bound to make sure all statutory requirements are met. Those requirements are:

- you have emigrated permanently to New Zealand
- you have requested all of your super to be paid into a Kiwi Saver fund
- you have opened a new Kiwi Saver account
- you have provided us with the Kiwi Saver fund name and your new account number
- the Kiwi Saver fund has confirmed they will accept the payment.

To make the move as simple as possible, the following page provides details of everything you need to give us so we can get everything sorted for you.

It is not possible to move KiwiSaver funds into Hostplus.

At present Hostplus, does not accept transfers from a KiwiSaver scheme.

Australian super funds are not required, by law, to accept balances transferred from New Zealand (whether from a KiwiSaver scheme or from another NZ super fund).

i Australian-sourced super savings transferred to a KiwiSaver scheme:

- can't be withdrawn to buy your first home
 - can only be accessed once you turn 60 and satisfy the accepted Australian superannuation industry definition of "retirement" at that age
 - can't be transferred to a third country
 - you will no longer be a Hostplus member and your insurance will cease on transfer.
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How to move your super.

1. Complete the transfer form

To get the process started you will need to complete a "Transfer to KiwiSaver" form.

Make sure you complete all the fields marked 'Mandatory'.

2. Send us these documents

As well as the "Transfer to KiwiSaver" form, you'll also need to send us:

2.1. Proof of your identity in a certified document

You'll need to provide a certified copy of a current drivers licence or passport. To have a document certified, simply take the original and photocopies of both sides (where applicable) to an authorised official.

In New Zealand, authorised officials include:

- Australian Consular or Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Judge of a court
- Notary Public
- Police officer
- Registrar (or Deputy) of a court
- The official must write:
 - in English – on the photocopies: 'This is a true and correct copy of the original' and
 - their full name, address, occupation, date and registration number (if applicable) and sign each page
- Proof of their position eg. police badge number, consular stamp or similar

2.2. Proof of your residence in New Zealand

Please provide a document that shows your current New Zealand address. For example, a utility bill, rate notice or bank statement that is less than 3 months old.

2.3. A signed New Zealand Statutory Declaration confirming that you have moved permanently to NZ.

Please complete a statutory declaration confirming that you have now permanently moved to New Zealand.

New Zealand Statutory Declarations can be witnessed by Notary Publics, a Justice of the Peace or other qualified professionals. For a full list please to go www.legislation.govt.nz/act/public/1957/0088/latest/DLM314584.html

Your certified photocopies must be:

- clear and legible – and taken from the original documents. No copies please
- certified on the front of the photocopy not on the blank reverse side.

Return all the documents to us.

Once you've completed your application form and attached all of the required documents, please mail them to us at:

Hostplus
Locked bag 5046
Parramatta, NSW, 2124
Australia

Your checklist.

- Have you consented to the payment of the whole of your Australian superannuation benefits into a KiwiSaver fund?
- Have you confirmed that the KiwiSaver fund provider will accept the transfer?
- Have you opened a KiwiSaver account to accept the transfer – and have you provided the account name and number to Hostplus.
- Have you completed the Hostplus "Transfer to KiwiSaver" form you received from us?
- Have you attached proof of identity, proof of residence in New Zealand, and a properly signed and witnessed New Zealand Statutory Declaration?
- Have you attached proof of identity, proof of residence in New Zealand, and a properly signed and witnessed New Zealand Statutory Declaration?

Need help?

If you require further assistance completing your application, please call us on **1300 467 875** if you are still living in Australia or +61 3 9067 2500 if you have already moved to New Zealand, between 8am – 8pm AEDT Monday to Friday.



The information contained in this document is general information only and is current at January 2020. This information is general information only and does not take into account your personal objectives, financial situation or needs. You should consider if this information is appropriate for you in light of your circumstances before acting on it. Please read the Hostplus Product Disclosure Statement (PDS), available at www.hostplus.com.au before making a decision about Hostplus. Issued by Host-Plus Pty Limited ABN 79 008 634 704, AFSL 244392 as trustee for the Hostplus Superannuation Fund (the Fund) ABN 68 657 495 890, MySuper No 68 657 495 890 198. INH 1142 05/21



KiwiSaver rollover form.

Authority to release your Hostplus superannuation benefit

This KiwiSaver application acts as an authority for us to release your Hostplus benefit. A fully completed application form must be provided when requesting a transfer to a complying New Zealand KiwiSaver scheme.

Please ensure that you **complete all mandatory sections (marked *)** in dark blue or black ink and print in **BLOCK letters**.

On completion, please return this form to the following address: **Locked Bag 5046, Parramatta NSW 2124.**

1 Provide your personal details.

Title Mr Mrs Ms Dr Other Gender Male Female Intersex/Indeterminate/Unspecified

Given names*

Surname*

Date of birth* Mobile phone Hostplus membership number*

Current address in New Zealand*

Suburb State P/C

Last known address in Australia*

Suburb State P/C

i Your privacy: Hostplus is collecting and may collect further personal and sensitive information from you in order to assess and determine your benefit application. You can access the Hostplus Privacy Policy at www.hostplus.com.au/privacy.

2 Fund details.

FROM (Transferring Fund)

Fund name: Hostplus Superannuation
Unique Superannuation Identifier: HOS0100AU

Fund phone number: 1300 467 875 / +61 3 9624 7370
Australian Business Number: 68657495890

TO (Receiving Fund)

KiwiSaver Scheme name* KiwiSaver membership number*

KiwiSaver registration number* KiwiSaver phone number*

KiwiSaver Scheme Address*

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

1. Insert name, address and occupation of person making the declaration.

I,
of

Do solemnly and sincerely declare that: (please state the facts of your declaration)

- 1. I have permanently emigrated to New Zealand
- 2. All supporting documents provided with this application are true and correct

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

Note: What you write must be true. You can be prosecuted if you make a false declaration.

2. Member's signature/ signature of person making the declaration.

Signature

Declared at	(DD/MM/YYYY)

3. Witness's signature/ signature of person before whom the declaration is made.

Before me,

The witness's full name, qualifications and address must be provided below. If this is not completed the application will be rejected.

4. Full name, qualifications and address of person before whom the declaration is made (in printed letters).

Given name	Middle initial/s	
Surname		
Qualifications		
Address		
Suburb	State	P/C
Country		

4 Supply all proof of identity and proof of residency in New Zealand items as described below

- | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------|------------|---------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Attached a certified copy of my current drivers licence or passport | AND | <input type="checkbox"/> A certified copy of proof of residence in NZ showing address eg. utility bill, council rate etc. |
|
 | | |
| <input type="checkbox"/> AND Australian or New Zealand Statutory Declaration stating I have permanently emigrated to New Zealand | | |

5 Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and have obtained or do not require any further information.
- I discharge Hostplus of all further liability in respect of the benefits paid and transferred to my KiwiSaver Account.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I wish to transfer my entire benefit to my KiwiSaver Account
- I have permanently emigrated to New Zealand
- My KiwiSaver provider has confirmed they can accept this transfer

*Name (Print in BLOCK LETTERS)

*Signature

*Date (DD/MM/YYYY)

*Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.