

# Transfer from Spirit Super to a KiwiSaver Scheme

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## Important information

Complete this form if you've permanently moved to New Zealand and you want to transfer your Spirit Super account to your KiwiSaver. For more information refer to our *Transferring your super to a KiwiSaver* fact sheet available at [spiritsuper.com.au/documents](https://spiritsuper.com.au/documents).

### Things you should know:

- Your insurance will cease if you close your account.
- If you want to claim a tax deduction or split your contributions, do this before submitting this form. These options aren't available for contributions you've withdrawn from Spirit Super.
- You should seek personal advice to confirm if this payment will have tax or social security implications.

If you have more than one Spirit Super account, complete a separate form for each account.

## Section 1 Current personal details

Member number

Account number

Date of birth (DD MM YYYY)

Place of birth

Last name

Given name/s

Current New Zealand residential address

Suburb/Town/City

NEW ZEALAND

Postcode

Preferred phone

Email

New Zealand IRD Number



**Section 2**  
**Previous personal details**

Previous names (if applicable)

Previous Australian residential address

Suburb/Town/City

State

Postcode

Previous email (if different to above)

Australian tax file number (TFN)

Do we have your TFN?

Yes

No, but here it is

You don't have to provide your TFN, but you may pay extra tax.

Refer to our *How super is taxed* fact sheet available at [spiritsuper.com.au/pds](https://spiritsuper.com.au/pds) for more information.

**Section 3**  
**KiwiSaver transfer details**

KiwiSaver scheme name

KiwiSaver scheme address

Suburb/Town/City

NEW ZEALAND

Postcode

KiwiSaver registration number

KiwiSaver membership number

**Section 4**  
**Before you transfer your super**

If you don't answer the below question we'll assume that you don't want to claim a tax deduction for the personal contributions made to your account. This may not be available to you after you transfer your account.

Do you want to claim a tax deduction for personal contributions made to your account in the current or previous financial year?

No

**Yes.** You need to submit a *Notice of intent to claim or vary a deduction for personal super contributions* form before you submit this form. You can do this in **Member Online** or download the form from [ato.gov.au](https://ato.gov.au).

**Section 5**  
**Transfer documents required**

To complete this transfer you'll need to:

provide written evidence of your KiwiSaver membership number and that they're able to accept this transfer before the payment can be made

provide an original certified copy of your proof of identity. For more information, refer to our *Transferring your super to a KiwiSaver* fact sheet

provide original certified copies of proof of residency in New Zealand if your proof of identity doesn't state your current New Zealand residential address, such as a council rates notice or utility bill.

## Section 6 Statutory declaration

You must complete a statutory declaration confirming that you've permanently moved to New Zealand. You may complete the New Zealand statutory declaration provided below or provide an Australian statutory declaration. For more information about providing and witnessing statutory declarations, refer to our *Transferring your super to a KiwiSaver* fact sheet.

### New Zealand Statutory Declaration – Oaths and Declarations Act 1957

Full name of applicant

I,

Residential address of applicant in New Zealand (no PO Boxes)

Of:

Occupation of applicant

Occupation:

...make the following declaration under the *Oaths and Declarations Act 1957*:

- I've permanently moved to New Zealand.
- To the best of my knowledge, the information I've provided is true and correct.
- I understand that I will lose benefits such as insurance if my account is closed. I've considered this and don't require any further information.
- I understand that if Spirit Super receives any contributions after my account has been closed a new account may be opened for me.
- I discharge the Spirit Super trustee from any further liability in respect of my benefits paid and transferred from Spirit Super.
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at [spiritsuper.com.au/privacy-policy](http://spiritsuper.com.au/privacy-policy) or by calling us on 1800 005 166.
- I request and consent to the payment of my benefits as described above, and authorise Spirit Super to determine the tax treatment of my benefit.

I make this solemn declaration conscientiously believing the same to be true and by virtue of the *Oaths and Declarations Act 1957*. I'm aware that if I deliberately provide false information in this declaration I could be charged with an offence and sentenced in court.

I authorise Spirit Super to transfer my balance to my KiwiSaver scheme as detailed on this form.

Signature of applicant

Declared at (suburb where declaration signed)

Date (DD MM YYYY)

On

Before me (Print full name of the qualified person witnessing the declaration)

Signature of the official witness

Title (Title as defined in the *Oaths and Declarations Act 1957*)

Address (Address of the official witness)

**Note:** Only some people can witness a New Zealand statutory declaration. These include:

- a Justice of the Peace (JP)
- a solicitor or notary public
- a Registrar or Deputy Registrar of the District Court or the High Court
- authorised staff in some government agencies.

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Return the completed, signed and dated application form to [info@spiritsuper.com.au](mailto:info@spiritsuper.com.au) or Spirit Super, GPO Box 1547, Hobart TAS 7001.