

LEAVING SERVICE BENEFIT PAYMENT REQUEST

Please read this section before you start completing this form.

The Trustee will only authorise payment of your leaving service benefit if it is satisfied that you are leaving the teaching service in New Zealand.

Member to complete Steps 1 to 5 (please use BLOCK letters).

Step 1. Complete your personal details

Mr Mrs Ms Miss Other (please specify)

Surname/family name Given name(s)

Home/private address:
 Number Street Name

Suburb City Postcode

Work Phone

Home Phone

Mobile

Email*

MoE number

Date of birth / /

School employed at School number

* I acknowledge that by providing my email address, I am consenting to receiving information about the Scheme (including the annual report) electronically. Should I not wish to receive such information electronically, or should my email address change, I undertake to advise Mercer (N.Z.) Limited, the Scheme's administration manager.

Continued

Step 2. Criteria under which you are requesting a benefit (please tick and complete as applicable)

A. I am permanently leaving the teaching service in New Zealand

B. Last day of permanent service:

Last day of permanent service / /

I hereby confirm that I ceased employment either permanently or for a fixed term of 2 or more consecutive school terms' duration as a teacher or principal at any state or state integrated primary, intermediate, secondary or special school in New Zealand.

Withdrawal options:

1. I do not wish to withdraw any of my account balances in my name at this time.

OR

2. I am under 50 years of age and I have ceased employment as a teacher or principal at any state or state integrated primary, intermediate, secondary or special school in New Zealand, by reason of **disability, ill-health or redundancy** (as certified by the Secretary for Education). I wish to apply to the Trustee for a withdrawal of the following amounts:

Partial withdrawal amount \$ from the total balance (including Employer Account) available to me (minimum \$500)

or

Full withdrawal of my Scheme balance (including Employer Account) and also wish to close my account.

Important: To be eligible for this benefit you must attach either a sworn (Justice of the Peace or Notary Public) declaration or a letter from your school management confirming that your disability, ill health or redundancy is the legitimate reason for your leaving the teaching service. In the case of medical reasons, a copy of the relevant medical certificate is also required.

OR

3. I am 50 years of age or over and elect to withdraw the following amount/s:

Partial withdrawal amount \$ from the total balance (including Employer Account) available to me (minimum \$500)

or

Full withdrawal of my Scheme balance (including Employer Account) and also wish to close my account.

Important: To be eligible for any benefit from your Employer Account, the Secretary for Education must certify that you have ceased employment either permanently or for a fixed term of 2 or more consecutive school terms' duration as a teacher or principal at any state or a state integrated primary, intermediate, secondary or special school in New Zealand. You must also certify that you are no longer employed as per Step 2 (B) and you are permanently leaving the teaching service in New Zealand as certified in Step 2 (A) above.

OR

4. I elect to transfer the following amounts to another registered superannuation scheme. I understand that the scheme to which I elect to transfer must be approved for that purpose by the Secretary for Education. The transfer must be paid directly from the Teachers Retirement Savings Scheme to the superannuation scheme to which I elect to transfer*.

I elect to transfer:

The full balances of all accounts held in my name, or

I elect to transfer the following specific amount \$ (minimum \$500)

**The funds within your Scheme account are classified as Unlocked (standard) funds since the Scheme is a non-complying fund. Please note, once your Unlocked funds are transferred, they will be classified as locked funds and under any limitations as per the KiwiSaver Act. That means, if you transfer your unlocked funds to another complying superannuation fund or KiwiSaver scheme, you generally won't be able to withdraw that money until you reach the age of eligibility for New Zealand Superannuation (currently age 65).*

Step 3. Complete your payment details

Payment details (Please tick one and complete):

Direct credit to my bank account. I have **attached** a bank-encoded deposit slip or copy of a bank statement print out;

OR

Transfer to the following superannuation scheme

Administrator's name and contact details

Telephone

Email

Postal address

Postcode

If you have elected to transfer an amount to another superannuation scheme, the payment will be made directly to the nominated superannuation scheme.

Step 4. Confirmation of your identity and residential address

If you have confirmed your identity and address with Mercer previously and your details haven't changed, please go to Step 5.



Copies of your documents can be certified by one of the following: Justice of the Peace, Solicitor, Notary Public or Member of Parliament. For a full list of certifiers and acceptable documents and how these can be certified please read Confirmation of Identity Guide available on www.teachersretire.org.nz website.



Certified documents are only valid for 3 months.



To the certifier: The certifier must view the original document(s) (not a fax, photocopy or scan) before writing their **Full Name, Occupation, Date** and **Signature** and make a statement to the effect that the document(s) provided are a true copy and represent the identity of the named individual.

Step 4. Confirmation of your identity and residential address (continued)

Your withdrawal request must be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

Option 1 – Electronic identity verification

Mercer as the administration manager has the ability to electronically verify your identity. Once we have received your withdrawal request we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification you must have: a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following:

New Zealand Passport

OR

New Zealand Drivers Licence

If this method of identification is unsuccessful you will be required to provide certified ID.

Option 2 – Certified copies of identity documents and confirming your residential address

Please provide a certified copy of your identity documents. Refer below for information on acceptable identity documents and who can certify them. You will also need to provide us with copies of documents confirming your residential address, please refer below.

Preferred identification method – please select one of the following options:

Option 1 – I would like the administration manager to electronically verify my identity

Option 2 – I would like to provide the administration manager with certified copies of my identity documents

If you have selected Option 1 you do not need to provide certified ID now.

Provide a certified photocopy of current and valid documents.

If you selected Option 2 as your preferred way for us to verify your identity, please select one of the certified identification options below. We are only able to accept original certified copies of certified ID (i.e. the copy that has been physically certified). These documents must be posted to us - our postal address is Mercer (N.Z.) Limited, PO Box 1849, Wellington 6140, New Zealand. If your name has changed please provide evidence of your name change which links your previous and current names. Members who are supplying overseas identity documents must also provide proof of New Zealand residency.

A A certified photocopy of ONE of: **B** A certified photocopy of ONE of: **C** A certified photocopy of ONE of:

A New Zealand or an overseas passport; or

A New Zealand firearms licence; or

A New Zealand Certificate of Identity*; or

A New Zealand Refugee travel document; or

An emergency travel document; or

An overseas government national identity card (appropriate pages containing name, date of birth, photograph and signature)

A New Zealand or an overseas driver's licence; or

Kiwi Access Card (previously known as 18+ Card)

PLUS A certified photocopy of ONE of:

A New Zealand or an overseas birth certificate; or

A New Zealand or an overseas citizenship certificate

A New Zealand or an overseas driver's licence

PLUS A certified photocopy of ONE of:

A (Super) Gold Card; or

A Community services card; or

A bank account or a credit card statement issued by a New Zealand registered bank in the 12 months preceding the date of the application; or

A statement issued by Inland Revenue or another Government agency in the 12 months preceding the date of the application

* Please visit passports.govt.nz to read more about this ID document.

A Gold Card is NOT considered a type of a New Zealand Certificate of Identity.

Step 5. Sign the form



Member's signature

Date

 / /


BEFORE YOU RETURN THIS FORM

- Have you checked you have completed the form correctly?
- Have you attached all required documents?

Step 6. Return instructions



Member to send the documents to Teachers Retirement Savings Scheme, Ministry of Education, PO Box 3049, Wellington 6140, or alternatively email them to the Scheme's administrator, Mercer (N.Z.) Limited at nztrsserp@mercerc.com.

Step 7. Ministry of Education to complete

Contributions:

Basic

Voluntary

Employer (Net of Tax)

Total contributions from last 1 July to termination date:

 \$

 \$

 \$

Date of final contributions

 / /

Reason for benefit payment: *(please tick one or more as applicable)*

- The member is under the age of 50 years and has permanently ceased employment either permanently or for a fixed term of 2 or more consecutive school terms' duration in a teaching capacity or as a principal at any state or state integrated primary, intermediate, secondary or special school in New Zealand,

OR

- The member is aged 50 years or over and has permanently ceased employment either permanently or for a fixed term of 2 or more consecutive school terms' duration in a teaching capacity or as a principal at any state or state integrated primary, intermediate, secondary or special school in New Zealand,

AND

- The Secretary for Education has certified that the member has ceased employment as a teacher or principal at any state or state integrated primary, intermediate or special school by reason of:

- Disability
- Ill health
- Redundancy

Comments:

I certify that the above-named member is eligible to receive a benefit from the Employee Retirement Plan as indicated above.



Signature

Date

 / /

Name

Position