

# PERMANENT EMIGRATION BENEFIT PAYMENT REQUEST

**Please read this section before you start completing this form.**

If you permanently emigrate from New Zealand, you may apply to the Trustee to transfer your total account balances to an overseas superannuation scheme. Alternatively, you may apply to withdraw your total account balances 12 months after the date of your permanent emigration. You are required to provide evidence of your permanent emigration to the Trustee.

**Member to complete Steps 1 to 6 (please use BLOCK letters).**

**Step 1. Complete your personal details**

Mr  Mrs  Ms  Miss  Other (please specify)

Surname/family name  Given names

Home/private address:

Number  Street Name

Suburb  City  Postcode

Work phone

Home phone

Mobile

E-mail\*

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.

**Step 2. Member to complete A or B****A. Request for transfer of funds**

**I have permanently emigrated from New Zealand and wish to transfer my total account balance to an overseas superannuation scheme (as approved by the Secretary for Education) and exit the Scheme.**

**Details of overseas superannuation scheme:**

Scheme name

Scheme email

Scheme postal address:

Number Street Name

Suburb

City

Postcode

State

Country

Scheme phone number

Your membership/customer number

If you are emigrating to Australia, please also provide the following information:

Australian business number (ABN)

 -  -  - 

Superannuation product identification number (SPIN)

 - 

**Important:** The superannuation scheme to which you wish to transfer your total account balance must be approved by the Secretary for Education. You must also check with the trustees of your new superannuation scheme to ensure they can accept this transfer prior to submitting this request.

**OR****B. Request for withdrawal of funds**

**I confirm that I have permanently emigrated from New Zealand and have been overseas for a period of 12 months or more and wish to withdraw my total account balance and exit the Scheme. I attach a bank-encoded deposit slip or copy of a bank statement print out.**

**I have resided at the following overseas address for the period shown below.**

Number Street Name

Suburb

City

Postcode

State

Country

From:  /  / To:  /  / **Step 3. Confirmation of your identity and residential address**

If you have not previously done so, you must provide confirmation of your identity and residential address. This information is required under the *Anti-Money Laundering and Countering Financing of Terrorism Act*. We cannot make any benefit payment until it has been received.

For details of what is required, including completing the *Confirmation of identity and residential address form (Form 11)*, refer to the *Confirmation of identity guide* in the *Documents & forms* section of the Scheme website, **[www.teachersretire.org.nz](http://www.teachersretire.org.nz)**.

Please tick one:

I have previously provided confirmation of my identity and residential address;

**OR**

Attached are the completed *Confirmation of identity and residential address form* and copies of the required documents, certified where necessary.

## Step 4. Member to provide supporting documentation

### Evidence of permanent emigration

Please provide the following documentation with this application:

- Proof of departure from New Zealand (e.g. plane ticket, copy of passport showing entry stamp or other travel documents), **and**
- Proof that you have lived at an overseas address (e.g. utility bill, bank statement, rental agreement etc) at some time during the year after your departure from New Zealand, **and**
- Proof of your visa for living in another country, if applicable (i.e. a photocopy of the visa), **and**
- If you have requested a withdrawal of your total account balance under Step 2B and evidence you are supplying indicates you have temporarily returned to New Zealand since permanently emigrating (e.g. for a holiday), please indicate the reasons for the return, on the document.

**Important:** Supporting evidence must be sighted, and this form must be signed, by a person authorised to take a statutory declaration. (Refer to Step 5 for a list of people authorised to take a statutory declaration.)

## Step 5. Member to complete the statutory declaration in front of authorised person

### Complete the statutory declaration

Please complete this section in front of a person authorised to take a statutory declaration (being one of the persons listed below).

- i) A declaration made in a Commonwealth country outside New Zealand may be made before a notary public, a Justice of the Peace, a Judge, a Commissioner of Oaths or any other person authorised by the law of that country to administer an oath for the purpose of a judicial proceeding, or before a Commonwealth representative, or before a solicitor of the High Court of New Zealand.
- ii) A declaration made in a country other than a Commonwealth country shall be made before a Commonwealth representative, a notary public, a Judge or a solicitor of the High Court of New Zealand.

I, \_\_\_\_\_ (Full name),  
of \_\_\_\_\_ (Address),  
and \_\_\_\_\_ (Occupation).

request a (tick one):  transfer OR  withdrawal of my total account balance due to permanent emigration. I understand that payment of any benefit is at the discretion of the Trustee.

I solemnly and sincerely declare that I permanently emigrated from New Zealand on this \_\_\_\_\_ day of \_\_\_\_\_ (month), 20 \_\_\_\_\_ (year).

and that 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.**

 Member's signature

Declared at \_\_\_\_\_ (Location),  
this \_\_\_\_\_ (day) of \_\_\_\_\_ (month) 20 \_\_\_\_\_ (year).

Before me:  
Name \_\_\_\_\_  
(A Justice of the Peace or other person authorised to take a statutory declaration)

Occupation: \_\_\_\_\_

 Signature

MoE number



### BEFORE YOU RETURN THIS FORM

- Have you checked you have completed the form correctly?
- Have you attached a bank-encoded deposit slip (if relevant)?
- Have you attached evidence of your permanent emigration and has this been sighted by an authorised person?
- Have you attached documents confirming your identity and your address and have these been correctly certified (if applicable)?
- Have you correctly completed the statutory declaration section?
- Has the statutory declaration been witnessed by an authorised person?

## Step 6. Return instructions

**Member to retain a copy of this form.**



**Member to send the original to Teachers' scheme Administrator, Mercer (N.Z.) Limited, PO Box 1849, Wellington 6140 or by email to [nztrssep@mercerc.com](mailto:nztrssep@mercerc.com).**