

## UNDER AGE 50

# IN-SERVICE VOLUNTARY ACCOUNT WITHDRAWAL

## Eligibility

Since the Scheme's purpose is to help you save towards a financially secure retirement, except under specific circumstances such as significant financial hardship, the only withdrawal you may make prior to age 50 is from your Voluntary Account.

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

### Step 1. Complete your personal details

Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Ms <input type="checkbox"/>	Miss <input type="checkbox"/>	Other (please specify) <input type="text"/>
Surname/family name			Given names	
<input type="text"/>			<input type="text"/>	
Home/private address:				
Number		Street Name		
<input type="text"/>		<input type="text"/>		
Suburb		City		Postcode
<input type="text"/>		<input type="text"/>		<input type="text"/>
Work phone			Home phone	
<input type="text"/>			<input type="text"/>	
Mobile			E-mail*	
<input type="text"/>			<input type="text"/>	
MoE number			Date of birth	
<input type="text"/>			<input type="text"/>	
School employed at			School number	
<input type="text"/>			<input type="text"/>	

\* 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 2A. Withdrawal of funds (please tick boxes as applicable and complete)

I am under 50 years of age and wish to withdraw:

the full balance of my Voluntary Account;

**OR**

\$  from my Voluntary Account (min of \$500).

### Step 2B. Payment details

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

### 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. Sign the form



Member's signature

Date

  /   /    

#### BEFORE YOU RETURN THIS FORM

Have you attached, where required:

- A bank-encoded deposit slip or copy of a bank statement print out?
- Documents confirming your identity and address?

### Step 5. 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@merceroz.com](mailto:nztrssep@merceroz.com).**