Transfer your super to a KiwiSaver account

Are you moving permanently or indefinitely to New Zealand? You can use this form to apply to transfer your super from Cbus Super to a New Zealand KiwiSaver account.

How to transfer your super to a KiwiSaver account

You can transfer your super to a KiwiSaver account in just four simple steps:

1. Check your eligibility
2. Complete the *Application to transfer your super to a KiwiSaver account* form and attach:
   a. certified proof of your identity
   b. proof of your New Zealand residence
3. Provide a statutory declaration stating you've permanently emigrated to New Zealand – using either the attached Australian or New Zealand statutory declaration form
4. Return your forms and documents to:
   Cbus Super, Locked Bag 5056, Parramatta NSW 2124

Make sure you complete all mandatory fields (*), otherwise we won't be able to process your request. Visit **ato.gov.au** for more information on transfers to a KiwiSaver scheme.

Checking your eligibility

To be able to transfer your super to your KiwiSaver account you must:

- ☑ have a KiwiSaver account in your name
- ☑ check your KiwiSaver scheme will accept your Australian super (not all schemes accept transfers from Australia)
- ☑ have emigrated permanently to New Zealand
- ☑ transfer all of the money in your Cbus Super account (partial transfers aren't allowed).

Providing proof of your identity

To prove your identity, you need to provide a certified copy of your:

- current driver's licence, or
- current passport.

How to certify documents

To certify a document, you must take the original document and the photocopy to an authorised person. If your identification is double-sided, make sure you copy both sides. The authorised person must:

- write in English on the photocopies: 'This is a true and correct copy of the original' and
- write their name, occupation and registration number (if applicable) and sign and date each page.

Important: Certified photocopies need to be clear and legible. We can't accept certified documents that have been faxed or photocopied, or those certified on the reverse side of a photocopied document.

Who can certify an original document outside of Australia?

The following people are authorised to certify your documents:

- Justice of the Peace
- Notary public officer
- Australian consular officer or Australian diplomatic officer
- Judge or magistrate of a court
- A registrar or deputy registrar of a court.

Providing proof of your New Zealand residence

If the document you've used to prove your identity (i.e. your driver's licence or passport) doesn't have your current address in New Zealand on it, you'll need to provide an additional document that proves your address. This could include a utility bill, a council rate notice or bank statements.

Providing your statutory declaration

You must provide an Australian or New Zealand statutory declaration stating you have permanently emigrated to New Zealand.

Different rules apply for Australian and New Zealand statutory declarations – refer to the relevant statutory declaration form attached for details.

Privacy

Please refer to the *Privacy policy* and *Personal information collection statement* at **cbussuper.com.au/privacy** for details about how we collect and disclose personal information or contact us on **1300 361 784** for a copy.

United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as Trustee for the Construction and Building Unions Superannuation Fund ABN 75 493 363 262 (Cbus and/or Cbus Super). 1377.6 01-24 ISS5

Contact us



Cbus Super
Locked Bag 5056
PARRAMATTA NSW 2124



1300 361 784
8am to 8pm (AEST/AEDT)
Monday to Friday



cbusenq@cbussuper.com.au
cbussuper.com.au
Log in to chat to us online



Visit us in person in Adelaide, Brisbane, Melbourne, Perth and Sydney.
Details: **cbussuper.com.au/contact**

United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as Trustee for the Construction and Building Unions Superannuation Fund ABN 75 493 363 262 (Cbus and/or Cbus Super).

1377.6 01-24 ISS5

Application to transfer your super to a KiwiSaver account

Please use black or blue pen and CAPITAL letters. Use an X in boxes where required.

Completing this form

- This form is only for whole (not partial) balance transfers
- * Denotes a mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

After completing this form

- Sign and date the authorisation
- Send the form to either your **FROM** (transferring) fund or your **TO** (receiving) fund.

Step 1: Provide your personal details

Title: Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

*Given name(s)

*Family name

Other/previous names

*Date of birth D D / M M / Y Y Y Y

Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be tax consequences.

NZ Inland Revenue Department (IND) No

Gender ☐ Male ☐ Female

Current address in New Zealand (residential only, no P.O. boxes)

*Address

*Suburb

*Town/city Country NZ *Postcode

Contact phone number

Last known address in Australia
(This must be the address Cbus Super holds for you.)

*Address

*Suburb

*State *Postcode

Step 2: Provide your fund details

FROM (transferring fund)
If you have multiple accounts with Cbus Super, make sure you complete a separate form for each account you want to transfer.

Fund name: CBUS SUPER

Fund phone number: +61 2 8571 6550

*Cbus Super member number

Australian business number: 75 493 363 262

Unique Superannuation Identifier: CBU0100AU

TO (receiving fund)
Make sure you check this KiwiSaver scheme can accept your transfer first.

*KiwiSaver Scheme name

*KiwiSaver registration number

*KiwiSaver phone number

*KiwiSaver membership number

*KiwiSaver Scheme address

Step 3: Payment details

All payments will be issued to the receiving fund via International Telegraphic Transfer (ITT). You can get these details from the receiving fund.

*Bank SWIFT

*Bank name

*Bank address

Street address

Town/city

Postcode

*Beneficiary name

*Beneficiary address

Street address

Town/city

Postcode

*Beneficiary account number

Step 4: Attach your supporting documents

- ☐ *Certified copy of your proof of identity document
- ☐ *Australian or New Zealand Statutory Declaration stating you have permanently emigrated to New Zealand
- ☐ *Proof of your New Zealand residence (e.g utility bill, council rates, etc)

Step 5: Authorisation

By signing this request form I confirm:

- I have read this form and the information completed is true and correct.
- I am aware I may ask Cbus Super for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, including my insurance, and have obtained or do not require any further information.
- 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.
- Cbus Super shall be released from all claims, liabilities and obligations in respect of my interest in the Fund and any insurance cover will stop from the date that the benefit is transferred to my KiwiSaver Account.
- 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.

*Sign here:

*Date

D D / M M / 2 0 Y Y

*Name (Print in BLOCK LETTERS)

New Zealand Statutory Declaration – Transfer to KiwiSaver

Complete this form if you wish to make a New Zealand statutory declaration.
Please use black or blue pen and CAPITAL letters.



Completing this form

This form must be signed in New Zealand by:

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

For more information on who can witness a Statutory Declaration visit:
legislation.govt.nz/act/public/1957/0088/latest/whole.html#DLM316165

Declaration:

I, _____ _____
Given name Family name

of _____
Address in full

_____
Occupation

do solemnly and sincerely declare that:

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*.

Sign and witness

Signature of person making the declaration

Sign here:

Declared at _____ on _____ of _____
Place Day Month and Year

Declared before me,

Sign here:

Signature of person witnessing the declaration

_____

_____

_____

_____

_____

Full name, qualification and address of person witnessing the declaration (in printed letters)

Sign this form and mail it to Cbus Super, Locked Bag 5056, PARRAMATTA NSW 2124.

Australian Statutory Declaration – Transfer to KiwiSaver

Complete this form if you wish to make an Australian statutory declaration.
Please use black or blue pen and CAPITAL letters.



Completing this form

Australian Statutory Declarations must be witnessed by an authorised person listed under the *Australian Statutory Declaration Act 1959 (Cth) and Statutory Regulations 2018*. This includes:

- an Australian Consular or Diplomatic Officer at the Australian High Commission in Wellington, or
- the Australian Consulate-General in Auckland.

For more information on who can witness your Statutory Declaration visit **newzealand.embassy.gov.au/wltn/statdec.html**

New Zealand Justices of the Peace, solicitors etc. cannot witness an Australian statutory declaration.

Declaration:

I, _____ _____
Given name Family name

of _____
Address in full

_____
Occupation

make the following declaration under the *Statutory Declaration Act 1959*:

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

I understand that a person who intentionally makes a false declaration in a statutory declaration is guilty of an offence under section 11 of the *Statutory Declaration Act 1959* and I believe that the statements in this declaration are true in every particular.

Sign and witness

Signature of person making the declaration

Sign here:

Declared at _____ on _____ of _____
Place Day Month and Year

Declared before me,

Sign here:

Signature of person witnessing the declaration

Full name, qualification and address of person witnessing the declaration (in printed letters)

Note 1: A person who intentionally makes a false statement in a statutory declaration is guilty of an offence, the punishment for which is imprisonment for a term of 4 years — see section 11 of the *Statutory Declarations Act 1959*.

Note 2: Chapter 2 of the Criminal Code applies to all offences against the *Statutory Declarations Act 1959* — see section 5A of the *Statutory Declarations Act 1959*.

Sign this form and mail it to Cbus Super, Locked Bag 5056, PARRAMATTA NSW 2124.