

UK pension scheme transfers & KiwiWRAP KiwiSaver Scheme



Who should complete this form?

Please complete this form if any portion of your current KiwiSaver scheme balance was previously transferred to New Zealand from a UK pension scheme.

Details

Have you been a UK resident for tax purposes at any time during the current, or previous **five**, UK tax years (6 April – 5 April each year)?

Yes No

If you have answered 'yes' to the above, KiwiWRAP KiwiSaver Scheme is unable to accept your KiwiSaver transfer, as this may be deemed an unauthorised withdrawal and may incur significant penalty to you. We recommend you seek advice from a UK pension transfer specialist.

If you have answered 'no' to the above, please complete the rest of this form.

Please confirm your date of birth /

NOTE: We cannot accept any ex-UK pension funds into KiwiWRAP KiwiSaver Scheme for a person aged under 55 at time of application.

Please confirm the name of the original New Zealand pension scheme that your UK pension scheme funds were transferred into, and the date of transfer.

NOTE: We need to ensure that your original scheme transfer was made to a New Zealand QROPS compliant scheme at the date of the transfer.

Please attach evidence of the date of transfer and scheme name to this form.

Name of scheme

Date of transfer

 /

Please confirm the date that funds were transferred into your current KiwiSaver scheme (note: since 6 April 2015, KiwiSaver has not been a QROPS approved scheme).

You will need to attach evidence of the date of transfer to this form.

Date of transfer

 /

Declaration

I, *(full name)*

- Declare that the information given in this form is true and correct.
- Acknowledge that Consilium NZ Limited will rely on information provided in (or in connection with) this form and accordingly agree to indemnify it against any claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- Understand that if I have transferred funds from a UK pension scheme and/or have been a UK tax resident during the current or previous five UK tax years, Consilium NZ Limited may be required to report my scheme transfer to Her Majesty's Revenue and Customs (HRMC) and that this withdrawal may incur an unauthorised withdrawal fee that will be payable by me.

Signature

Date

Checklist

I have:

- Signed and dated the form.
- Attached evidence of the original pension scheme funds transfer to New Zealand (NZ scheme name and date of transfer).
- Attached evidence of the date of transfer to my current KiwiSaver scheme.

NEXT STEP

Please send your completed form by email or post to: **info@kiwiwrap.co.nz** or **PO Box 1106 Christchurch 8140**

Our privacy policy is available at www.consilium.co.nz/privacy-policy