

Nikko AM KiwiSaver Scheme - Deceased Estate Withdrawal Form

Please post this form and the other listed requirements to:

Nikko AM KiwiSaver Scheme

PO Box 3892, Shortland Street, Auckland 1142

We must receive the original of this form, we can't process electronic versions.

This application should be completed by the following, as Personal Representatives of the member:

Executors and Administrators

- The person(s) who has been granted Probate if the Deceased left a Will;
- The person(s) who has been granted Letters of Administration if the Deceased did not leave a Will;

OR

Relevant Person

- If the deceased member's KiwiSaver account balance is less than \$15,000 and no Probate or Letters of Administration have been granted, then a Relevant Person is able to complete this application;

Relevant Persons are:

- The surviving spouse, civil union partner or de facto partner or children of the deceased;
- The persons beneficially entitled to the estate of the deceased under a will or intestacy;
- Any person entitled to obtain administration of the estate of the deceased;
- Any person related by blood or marriage or civil union to the deceased person who undertakes to maintain the children of that person who are minors;
- Any person who is providing day-to-day care for any minor children of the deceased.

Proof of your relationship to the deceased must be provided in order to apply as a Relevant Person.

Checklist

This application needs to include the following:

Executors and Administrators

- a certified copy of Probate or letters of Administration
- certified copies of proof of identity and residential address for each Executor and Administrator making the application (section 3)
- proof of the bank account for payment of the withdrawal (section 4)
- completed statutory declaration (section 5), witnessed by a person authorised to take statutory declarations

Relevant Persons

- a certified copy of the Death Certificate or Medical Cause of Death Certificate
- a certified copy of the Will (if the deceased left a Will)
- proof of your relationship to the deceased e.g. Marriage/Birth Certificate or statutory declaration by a witness as to your de facto relationship with the deceased (as applicable)
- proof of the bank account for payment of the withdrawal (section 4)
- certified proof of identity and address for each of the Relevant Persons making the application (section 2)
- completed statutory declaration (section 5), witnessed by a person authorised to take statutory declarations
- additional declaration for applications being made by a Relevant Person (section 6)

1. Deceased Details

Title	
First name(s)	
Surname	

Postal address			
Street			
Suburb			
City		Postcode	

Date of Birth (dd/mm/yyyy)	
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IRD number:

2. Personal Representatives – Executors, Administrator Or Relevant Person/s

Title	
First name(s)	
Surname	

Postal address			
Street			
Suburb			
City		Postcode	

Occupation			
Contact Phone			
Email			
Relationship to the deceased member			

Title			
First name(s)			
Surname			

Postal address			
Street			
Suburb			
City		Postcode	

Occupation			
Contact Phone			
Email			
Relationship to the deceased member			

3. Identification and Proof of Address of the Personal Representatives, where they are Individuals, and Relevant Persons

As part of this application, all personal representatives must provide certified copies of ID and proof of address. All photocopied documents must be verified or certified by an authorised person (see below) before sending them to us.

Please provide us with either:

- a copy of your current passport (page showing your name, date of birth, photograph and signature), or-a copy of your current driver licence showing your name, signature and expiry date, AND a bank account statement or document that contains your full name and addressed to you by a New Zealand registered bank within the last 3 months, or statement from any New Zealand government department addressed to you dated within the last 3 months, or New Zealand SuperGold card, or birth certificate, or
- a copy of your current firearms licence.

AND one of the following issued and dated within the last 3 months, showing your name and current residential address:

- Bank statement
- Utility bill (e.g. power or home phone bill)
- Rates bill
- Letter or statement from a NZ government agency

Who can certify your documents?

The following people can certify photocopies of original documents as true and correct copies:

- Notary Public
- Justice of the Peace
- Member of the Police
- New Zealand lawyer
- New Zealand Chartered Accountant
- A person who has legal authority to take statutory declarations (or equivalent) in New Zealand.

Please note that the certifier must be at least 16 years of age and cannot be:

- a person involved in the transaction requiring the certification
- related to you
- your spouse or partner
- a person who lives at the same address as you.

Copies of ID and proof of address must be recently certified (in the previous three months) as a true copy of the original which represents your identity by one of the people listed above.

4. Payment Details

Bank Account Details

We can only pay your withdrawal to a New Zealand bank account in the name of the deceased, their estate, executor, administrator or relevant persons.

Payment account

Bank Branch Account Number Suffix

Name of bank account holder

Proof of Bank Account

Please provide proof of the nominated bank account name and number:

- a pre-printed deposit slip
- a copy of a bank statement
- an over-the-counter printed receipt with a tellers stamp
- an online bank account statement with the name of the bank included on the statement

5. Statutory Declaration

Each Personal Representative or Relevant Person will need to make the statutory declaration below.

A statutory declaration is a written statement that allows a person to declare something to be true. You'll need to complete this page in front of an authorised person. You'll make the declaration, and the person witnessing will take the declaration.

Who can witness the declaration?

The following persons can witness you making the declaration:

- Notary Public
- Justice of the Peace
- Person enrolled as a barrister and solicitor of the High Court
- Registrar or deputy registrar of the Supreme Court, High Court, a District Court or Court of Appeal
- Member of Parliament
- Any other person authorised by law to take statutory declarations.

I, Full Name of Executor/Administrator/Relevant Person
of, Address
Postcode

And, Occupation

I, Full Name of Executor/Administrator/Relevant Person
of, Address
Postcode
And, Occupation

I, Full Name of Executor/Administrator/Relevant Person
of, Address
Postcode
And, Occupation

Solemnly and sincerely declare that:

- I am entitled to make this claim and that all the information provided in this form and any attachments is true and correct and complete.
- I will apply the proceeds from the withdrawal in the course of administration of the deceased's estate as the law requires.
- I declare that to the best of my knowledge and belief, the deceased's principal place of residence since the deceased first joined a KiwiSaver scheme was in New Zealand. If the deceased did not reside principally in New Zealand for any period since becoming a KiwiSaver member, please specify that period(s) (ddmmyyyy):

From		to	
From		to	
- I indemnify the supervisor of the Nikko AM KiwiSaver Scheme, Nikko AM and any of their related companies against all claims, actions, demands, proceedings, costs or expenses, damages or liability arising and discharge them from any liability in respect of my membership of the Nikko AM KiwiSaver Scheme and/or any withdrawal payment made.
- I acknowledge that the Privacy Act 1993 gives me the right to access and request correction of personal information held by Nikko AM, Public Trust and their associated entities and agents. The information will be held securely by Nikko AM whose address is Level 9, Vero Centre, Auckland 1010, New Zealand and MMC Limited, whose address is Level 25, QBE Centre, 125 Queen Street, Auckland 1010, New Zealand. I understand that the information supplied will be used to process my withdrawal request from the Nikko AM KiwiSaver Scheme (and may be disclosed for these purposes to third parties where relevant). The information may also be used by Nikko AM, Public Trust and their associated entities and agents to offer me other products or services it thinks may be of interest. I acknowledge that the information, and any information provided by me at later dates will be used and may be shared as outlined in our privacy statement on our website at www.nikkoam.co.nz.

- I confirm that the deceased was not an undischarged bankrupt or incapable of managing his/her financial affairs and that I am properly entitled to any payment made pursuant to this withdrawal form and that no other person has any claim against it.

6. Additional declaration for applications being made by a Relevant Person

I declare that the deceased (select one):

left a Will, and Probate has not and will not be applied for; or

did not leave a Will, and Letters of Administration have not and will not be applied for.

All representations, including my representation as a Relevant Person in a relationship with the deceased, are true and correct.

My relationship to the deceased was

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And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

Signature of the person making the declaration
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Declared at (location)	Date
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Signature of the person making the declaration
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Declared at (location)	Date
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Signature of the person making the declaration
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Declared at (location)	Date
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Before me: (the person in front of whom the declaration is made)

Full Name of person taking the declaration (the witness)
Address
Postcode

Signature of the person taking the declaration (the witness)

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