



KiwiSaver: **First or Second-Chance Home Withdrawal**

If you have not previously provided documents that verify your identity and your address to Pathfinder under anti-money laundering legislation, you will need to provide it before a payment can be made.

Your details

Title _____ First Name _____ Middle Names _____
Last Name _____ Date of Birth _____
Postal Address _____
Town/City _____ Country _____ Postcode _____
Home phone _____ Mobile _____
Email _____ IRD Number

Details of property being purchased

Property address _____ Postcode _____
Settlement date _____

Type of withdrawal

- ☐ First home withdrawal. This applies if you've never owned a property. Note: this includes the circumstance where you are purchasing an interest in a dwelling house on Maori land. You will need to attach certified evidence of your right to occupy this Maori land.
- ☐ Second-chance home withdrawal. You must include your confirmation letter from Housing New Zealand confirming that you qualify. For more information or the necessary form, please contact Kāinga Ora on 0508 935 266 or visit www.kaingaora.govt.nz.

Document Checklist: (tick as appropriate)

Please send us all applicable documents listed below for fast handling of your application.

- ☐ Completed Application Form
☐ Provide proof of solicitor's bank account
☐ Certified copy of identity following our guidelines
☐ Certified evidence of your right to occupy Maori land (if applicable)
☐ Address verification (if applicable)
☐ Completed Statutory Declaration
☐ Your Solicitor's Declaration (including a copy of sale and purchase agreement)



Amount of withdrawal

(please tick as appropriate)

- | | | |
|--|----|---|
| <input type="checkbox"/> The maximum amount possible | OR | <input type="checkbox"/> Amount: \$ _____ |
| <input type="checkbox"/> I want to use my KiwiSaver towards my deposit | OR | <input type="checkbox"/> solely towards property settlement |

Privacy statement

The information in this form, and in any documents relating to it, is being collected for the purposes set out in this form, including effectively managing you Pathfinder KiwiSaver Plan account. The information may be used by, and disclosed to, the Pathfinder Assest Management Limited (Pathfinder) and the Supervisor of the scheme, authorised agents, and to any other entity that is involved in the administration and management of your account, including Public Trust, Inland Revenue and any regulatory body. You agree that the Supervisor, Pathfinder and their authorised agents may collect and use the information for these purposes. The information is being collected by Pathfinder and will be held by Apex Group NZ. You can request access to your personal information and can ask to correct your information by calling 0800 Ethical (384 4225).

Member declaration

- ☐ I confirm that I have read and understood the above privacy statement.
- ☐ I confirm that all the information provided in this form is true and correct.
- ☐ I confirm that the withdrawal is for me to purchase my first home. If you are purchasing an interest in a house on Maori land, you also need to provide evidence of your right to occupy the Maori land; or
- ☐ I attach a certificate from Housing New Zealand confirming that I am in the same position as a first home buyer.
- ☐ I confirm that I am personally the buyer or one of the buyers of the house and I am not acting in a capacity as a trustee of a family trust.
- ☐ I confirm that this withdrawal will be used to purchase a house which will be my principal place of residence.
- ☐ I understand that my withdrawal value will be based upon the unit prices at the date my request is processed and may fluctuate.
- ☐ I understand Pathfinder needs at least **ten** business days to process my application.
- ☐ I have been a member of KiwiSaver for at least **three** years, since (date) _____

Principal place of residence

I confirm that for the period which I have been a member of KiwiSaver, my principal place of residence was:

- ☐ Always in New Zealand
- ☐ New Zealand, except for the following periods:
From _____ to _____
From _____ to _____
From _____ to _____

Give this form to your solicitor and ask them to complete the declaration over the page.





Statutory declaration

Please complete this section before an authorised witness¹.

I (enter your full legal name) _____

occupation (enter your occupation - or unemployed/retired) _____

of (enter the full residential address where you live) _____

solemnly and sincerely declare that:

- All the documents attached in support of my application are a true and correct record of my first or second-chance home withdrawal.
- For the period of my KiwiSaver membership, my principal place of residence was New Zealand except as specified in this application.

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

Signature of Declarant _____

Witness¹

Declared at (place, for example, town or city) _____ Date _____

Before me (details of official witness)

Name _____ Occupation _____

Address _____ Signature _____

¹A Justice of the Peace for New Zealand or other person (e.g. notary public, solicitor, officer of the court) authorised to take and receive Statutory Declarations.



Solicitor's declaration

Name of Solicitor _____ Firm _____
Address _____ Postcode _____
Email _____ Phone _____

As the legal representative for the Member, I confirm (each must be ticked):

- ☐ A copy of the sale and purchase agreement is attached. This confirms that the Member is the purchaser in his/her own right and not as a trustee of a family trust.
- ☐ The agreement for purchase is unconditional or expected to go unconditional on: _____
- ☐ The funds will be paid to the seller as part of the purchase price or, if the settlement is not completed by the due date (or any extended date), will be repaid to Member's KiwiSaver Account under Pathfinder.
- ☐ The property being purchased is the Member's first home, or the Member qualifies for a first home withdrawal under a HNZ certificate.
- ☐ The property is in New Zealand.
- ☐ The property being purchased will be the 'principal place of residence' of the Member.

Funds should be paid to our solicitor's trust account. Details are:

Account Name _____ Bank Name _____
Branch Name _____ Account Number

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Bank

Branch

Account Number

Suffix

Please enclose a bank deposit slip, otherwise evidence of the bank account details.

Signed by Solicitor _____ Date _____

Disclaimer: By typing your name above you are signing this application electronically. You agree that your electronic signature is the legal equivalent of your manual signature and confirm the information stated on this form is correct.



Certification guidelines

- Acceptable Documents
 - current passport (including your photo and signature pages) or Drivers Licence (back and front). If these are foreign documents they need to be translated into English.
 - utility bill, bank statement or letter from Government Department issued within the last 3 months showing your address.
- Certification must be within the last six months.
- The certifier must be: a JP; Chartered Accountant; Lawyer; Police Officer; Registered Teacher; Registered Doctor or any other person who has legal authority to take statutory declarations. The certifier cannot be your spouse, partner, relative or living at the same address as you.
- Upon comparing the copy with the original document, the certifier must write on the copy their name, occupation, their signature, the date and the following, "I certify this to be a true copy of the original document and confirm that it represents the identity of [full name of person being identified]."

Where do I send my application to?

Email return:

Please scan this application and email it to us at apply@pathfinder.kiwi or

Postal return:

Please send this application to: Pathfinder Asset Management, PO Box 2673, Auckland 1140.

If you have any questions, please contact 0800 ETHICAL (384 4225).

Please allow three business days for this application to be processed.

