

Kiwisaver Withdrawal Checklist



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Instructions

- Save this document as a copy to your desktop / Google Drive
- Make sure you follow the steps outlined below
- Tick off each step as you complete it - see far right-hand column
- Timing with your Kiwisaver withdrawal is important - make sure you complete each step as soon as you can
- If you have worked overseas, please make sure you allow up to 15 working days to withdraw your Kiwisaver.
- If you have only worked in NZ, you will need up to 10 working days to withdraw your Kiwisaver.
- You cannot use your Kiwisaver to pay the deposit at an auction
- You can use your Kiwisaver to pay the deposit for an auction.
- Please email me or call me if you have any questions

HouseMe Legal's Sherpas



Rebecca, Allison, and Angus

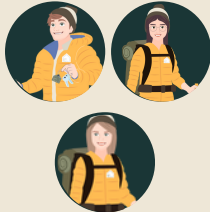
Client



STAGES	KIWISAVER TASKS	WHOSE JOB IS IT TO DO THIS?	COMMENT / LINK TO COMPLETE THE TASK	DONE? ✓
Start Here	Make sure you know who your Kiwisaver provider is and what their email address is		All of the main Kiwisaver provider's details can be found here. You can download your withdrawal form from this document.	☐
1	You need to send the initial email to your Kiwisaver provider		Read this document if you want to find out How to withdraw your Kiwisaver. Your template email to go to your Kiwisaver provider is here	☐
2	Receive your indicative figure from your Kiwisaver provider and add it to your budget		Save this spreadsheet to your computer and start filling out the spreadsheet (where applicable). Important Tip: Make sure you note that \$1,000 will remain in your account.	☐

Until you have a signed sale and purchase agreement, you need to wait. You may want to move your Kiwisaver fund to a less risky fund. Speak to a financial advisor.

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6A	If you are based in Auckland, please book an in-person meeting for Angus to certify your documents and witness your statutory declaration		Click here to book a meeting 110 Carlton Gore Road, Newmarket, Auckland	☐
6B	If you are not based in Auckland, please sign and declare your application in front of one of these persons.		Full list of people who can witness your Kiwisaver declaration.	☐
7	Make sure your passport has been certified correctly If you completed HouseMe Legal's on-boarding form correctly, I should already have this document	 	The wording next to your passport needs to say <i>I certify this to be a true copy of the original, which I have sighted, and the photo represents a true likeness of [client's name].</i> Angus Anthony Grayson Solicitor HouseMe Legal Limited Auckland Dated	☐
8	Make sure your proof of address has been certified correctly Proof of address should be from a utility provider, your bank etc. If you completed HouseMe Legal's on-boarding form correctly, I should already have this document	 	The wording on your proof of address needs to say <i>I certify this to be a true copy of the original, which I have sighted</i> Angus Anthony Grayson Solicitor HouseMe Legal Limited Auckland Dated	☐

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9	Do not sign the statutory declaration until you are in person with Angus or in front of one of these people (click here) .		This is the most common mistake people will make Your lawyer needs to witness your signature and ask you to make the statutory declaration Important Tip: Make sure your signature matches the signature in your passport	☐
10	Your lawyer will email all the required documents to your Kiwisaver provider		Documents that are normally emailed are: 1. Your certified passport 2. Your certified proof of address 3. HouseMe Legal's trust account details 4. Your signed sale and purchase Agreement 5. Your Kiwisaver withdrawal form (this includes the solicitor's certificate and your statutory declaration)	☐