Hive KiwiSaver Scheme

Court Order Withdrawal Application

A. Introduction and Steps to Apply

This form allows you to apply for a KiwiSaver withdrawal under a court order. Before proceeding, ensure you meet the following criteria:

1. A valid New Zealand court order directs the withdrawal.
2. The order specifies the amount and recipient of the funds.
3. You provide all required supporting documents.

Steps to Apply

- Read each section carefully and complete all required fields, including your Statutory Declaration.
- Attach all supporting documents.
- Submit the completed form directly or through your solicitor.

B. Return Instructions

- You must submit your application, along with all required supporting documents, at least 10 business days before your payment date.
- For faster processing times please return via email. Where not possible please return via post at the address below.

Email return

Please scan this application and all supporting documentation and email them to us at **hello@hive.co.nz**;

OR

Postal return

Please send this application and any supporting documentation to:

Hive Funds Limited, PO Box 147454, Ponsonby, Auckland 1144.

If you would like help in completing this form, please email **hello@hive.co.nz** or phone us on **0800 242 023**.

C. Checklist

Before returning this application, please ensure that:

- [ ] You have answered all questions in this form.
- [ ] You have completed the Statutory Declaration, witnessed by an authorised person.
- [ ] You have provided a correctly certified and dated photocopy of identification and proof of residential address.
- [ ] You have attached a certified copy of the court order authorising the withdrawal.
- [ ] The court order specifies the withdrawal amount and the recipient of funds.
- [ ] You have attached a pre-printed deposit slip or bank verification for the recipient's account.
- [ ] You understand that the withdrawal is subject to review and approval.
- [ ] You have attached any additional supporting documentation required by the court order.

D. Your Details

TITLE

FIRST NAME

MIDDLE NAME

SURNAME

RESIDENTIAL ADDRESS

SUBURB

CITY

COUNTRY

POSTCODE

DATE OF BIRTH

DD / MM / YYYY

MOBILE

EMAIL

IRD NUMBER

MEMBERSHIP NUMBER

H I V E

PIR ☐ 10.5% ☐ 17.5% ☐ 28%

Please go to https://www.ird.govt.nz/roles/portfolio-investment-entities/find-my-prescribed-investor-rate to work out your PIR, however if you have been residing outside of New Zealand for more than 325 days you will be a non-resident for tax purposes and the PIR of 28% will apply.

NOTE: Withdrawals cannot be processed until your current PIR rate is confirmed.

E. Withdrawal Details

Withdrawal Amount

A withdrawal of $ _____ as specified in the court order.

Source of Withdrawal (please tick one)

- ☐ Withdraw from all Hive KiwiSaver funds proportionally.
- ☐ Withdraw from specific funds as detailed below:

FUND MANAGER	FUND	% TO WITHDRAW
Aurora Capital	Hive Aurora Liquidity Fund	
	Hive Aurora Conservative Fund	
	Hive Aurora Growth Fund	
	Hive Aurora Aggressive Fund	
	Aurora First Home Buyer Strategy	
	Aurora RetirementPlus Strategy	
Harbour Asset Management	Hive Harbour Balanced Fund	
	Hive Harbour Growth Fund	
Pie Funds	Hive Pie Growth Fund	
	Hive Pie Aggressive Fund	
Munro Partners	Hive Munro Global Growth Climate Leaders Fund	

The total allocation must equal 100%.

Please note: We will adjust your withdrawal to account for any tax liability that may arise. Approval of this request is subject to verification of the court order and compliance with Hive's KiwiSaver withdrawal policies.

F. Payment Details

Please select the payment option that corresponds with the court order and provide the required details.

☐ **Solicitor's Trust Account**

If funds are to be paid into a solicitor's trust account, please provide:

Solicitor Details:

SOLICITOR'S NAME

SOLICITOR'S COMPANY NAME

Mailing Address:

STREET NUMBER / NAME / PO BOX

SUBURB/RD NO

TOWN/CITY

POSTCODE

COUNTRY

EMAIL

BANK ACCOUNT NUMBER (ENCLOSE A PRE-PRINTED DEPOSIT SLIP OR BANK VERIFICATION)

OR

☐ **Transfer to KiwiSaver Account**

If funds are to be transferred to another KiwiSaver scheme, please provide:

NAME OF KIWISAVER SCHEME

MEMBER'S FULL NAME

MEMBER'S IRD NUMBER

MEMBERSHIP NUMBER

Please note: Payments will only be made in accordance with the court order. Ensure all details are accurate and supporting documents are provided.

G. Privacy Statement

By completing this form I acknowledge that the Privacy Act 2020 gives me the right to access and correct personal information held by Hive Funds Limited (including the Manager, associated entities and agents) and the Supervisor. I agree that the information in this withdrawal form, and any information provided by me at any later date, may be used to administer my Hive KiwiSaver Scheme membership.

H. Statutory Declaration

FULL NAME (FIRST NAME, MIDDLE NAME, SURNAME)

ADDRESS

SUBURB

CITY

COUNTRY

POSTCODE

OCCUPATION

Solemnly and sincerely declare and agree that:

1. I have read and understood the privacy information on this form.

2. I confirm that a valid court order directs this withdrawal.

3. I have lived in New Zealand for the entire duration of my KiwiSaver membership, except for the following periods (if any):

FROM DD / MM / YYYY TO DD / MM / YYYY

FROM DD / MM / YYYY TO DD / MM / YYYY

FROM DD / MM / YYYY TO DD / MM / YYYY

FROM DD / MM / YYYY TO DD / MM / YYYY

5. I understand that if I have received any Government contributions for the above non-residency periods that these may be clawed-back from my KiwiSaver account.

6. I understand that the withdrawal will be made only as specified in the court order.

7. I have attached a certified copy of the court order authorising this withdrawal.

8. I am aware that incorrect or incomplete information may delay or prevent processing.

9. I have provided a pre-printed bank deposit slip or bank verification for the recipient's account as stated in the court order.

10. I consent to Hive Funds Limited conducting AML/CFT checks as required under the AML/CFT Act, including digital verification.

11. I affirm that all information provided is true and correct.

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

Signature of person making the declaration

SIGNATURE

DECLARED AT (PLACE)

DATE

DD / MM / YYYY

Before me

NAME

OCCUPATION

e.g. Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration

ADDRESS

SIGNATURE

I. Identity Verification

To verify your identity, we need a certified copy of:

- [ ] Your current passport showing your name, date of birth, photo and signature; or
- [ ] Your New Zealand Firearms Licence; or
- [ ] Your Birth Certificate AND one of the following:
  - [ ] both sides of your 18+ card; or
  - [ ] both sides of your current New Zealand driver licence; OR
- [ ] Both sides of your New Zealand driver licence AND one of the following:
  - [ ] a recent (dated within the last 12 months) bank statement; or
  - [ ] a recent (dated within the last 12 months) statement from a government agency; or
  - [ ] both sides of a NZ bank credit, debit or Eftpos card containing your name, signature and expiry.

To verify your address, we need a certified copy of:

- [ ] a recent (dated within the last 12 months) bank statement; or
- [ ] a recent (dated within the last 12 months) utility bill showing your name and residential address; or
- [ ] a recent (dated within the last 12 months) letter from a Government Agency.

Please do not post original identity documents

Certification of documents

- Certification of documents must have been completed in the 12 months preceding presentation of the certified documents.
- Each photocopy must be certified by one of the following referee types: a Justice of the Peace, a Solicitor of a High Court, or a Notary Public.

The certified document/s must state:

- **For photo ID:** "The document is a true and correct copy of the original which has been sighted and it represents a true likeness of the person presenting the document."
- **For address and non-photo ID:** "The document is a true and correct copy of the original document."
- If you are sending in more than one form of identification, all photocopies must be certified.