Hive KiwiSaver Scheme

Subsequent Retirement Withdrawal Application

A. Introduction and Steps to Apply

You can apply for a retirement withdrawal from your Hive KiwiSaver Scheme account once you reach the New Zealand Superannuation age of entitlement (currently 65).

Remember, you are not required to withdraw all or any of your KiwiSaver savings immediately. Your funds will continue to be invested as they are, and you can still contribute to your account if you choose. We encourage you to discuss your retirement options with a financial adviser. Our Client Services team can also arrange for an adviser to contact you; call us on **0800 242 023**, or email **hello@hive.co.nz**.

Is this the right form?

Use this form if you've **already made** a retirement withdrawal from the Hive KiwiSaver Scheme. If this is your first retirement withdrawal, please use the First Retirement Withdrawal Application instead.

What we need from you

As we've already verified your details, you don't need to provide ID or proof of address, or have a Statutory Declaration witnessed. Simply complete this form and sign the Member Declaration (Section H).

Changed your bank account?

If you'd like your withdrawal paid into a different bank account from your last withdrawal, please include proof of the new bank account in your name (for example, a bank deposit slip or a bank statement showing the account name and number). This doesn't need to be certified.

Changed your address?

Please update your address in Section D. You don't need to provide proof of address.

B. Return Instructions

- You must submit your application, along with all required supporting documents.
- 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 copies of 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 all applicable items are ticked:

- ☐ You have answered all questions in this form.
- ☐ You have signed and dated the Member Declaration (Section H).
- ☐ If your bank account has changed since your last withdrawal, you have provided proof of your new bank account in your name (e.g., a bank deposit slip or a bank statement showing the account name and number). This doesn't need to be certified.

D. Your Details

☐ Tick here if you are updating your address or any other personal 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.

Important PIR note: Please ensure your current PIR is confirmed to avoid processing delays. If your PIR is not confirmed by you, we will use the most recent PIR on file as provided by IRD. If no confirmed PIR is available, your withdrawal may be delayed.

E. Payment Details

Where would you like your withdrawal amount to be paid?

BANK ACCOUNT NAME

BANK

BRANCH

Bank Branch Account Suffix

☐ Tick here if this bank account is different from the one used for your last withdrawal. Please attach proof of the account in your name (it doesn't need to be certified).

Please note: We'll deduct any tax and expenses arising from this withdrawal from the amount we pay you.

F. Withdrawal Details

Amount of Withdrawal (please tick one)

Subject to the requirements of the Trust Deed for the Hive KiwiSaver Scheme, I request a:

☐ Full Withdrawal *Note: A full withdrawal will close your Hive KiwiSaver Scheme account.*

☐ Partial Withdrawal of $ (minimum withdrawal of $100)

☐ Regular Withdrawal of $

Frequency:

☐ Fortnightly starting: DD / MM / YYYY

☐ Monthly starting: DD / MM / YYYY

☐ Quarterly starting: DD / MM / YYYY *

*Please allow 3 business days for us to set up your regular payments.**

Source of Withdrawal (please tick one)

☐ Withdraw proportionally from all Hive KiwiSaver funds.

☐ Withdraw from specific funds as detailed below:

Complete the table below if withdrawing from specific funds. Percentages must add up to 100% across the funds you select.

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	

Please note: The total allocation for specific fund withdrawals must equal 100%. If you select "Withdraw proportionally," you do not need to complete the table above; your withdrawals will be processed evenly from all funds. If no selection is made, withdrawals will also be processed proportionally.

Important Account Closure Information

Please be aware: If your KiwiSaver account balance falls below $1,000.00 (taking into account any tax liability owed) following a withdrawal, a full withdrawal will be processed, and your KiwiSaver account will be closed.

G. Privacy Statement

By completing this form, you acknowledge and agree that:

1. The Privacy Act 2020 grants you the right to access and request corrections to your personal information held by Hive Funds Limited (as Manager of the Hive KiwiSaver Scheme), its associated entities and agents, and the Supervisor.

2. All information provided in this withdrawal form, and any further information you provide, may be used to administer your Hive KiwiSaver Scheme membership.

For full details of our privacy practices, please refer to our Privacy Policy at: www.hive.co.nz/privacy.

H. Member Declaration

By signing this form, I declare and agree that:

1. I have read and understood the privacy information provided in Section G.

2. I request a retirement withdrawal from my Hive KiwiSaver Scheme account.

3. I have previously made a retirement withdrawal from the Hive KiwiSaver Scheme.

4. I understand that this withdrawal is subject to the terms and conditions outlined in the KiwiSaver Act and by my KiwiSaver provider.

5. I am aware that providing incorrect or incomplete information in my application may hinder its assessment.

6. My withdrawal amount will be based on the market value of my investments when my request is processed. I understand that the withdrawal value may fluctuate based on the unit price(s) applicable at the time of processing, and that fees, taxes, and expenses may be deducted from my KiwiSaver account.

7. I give consent for Hive Funds Limited to conduct Anti-Money Laundering and Countering Financing of Terrorism (AML/CFT) checks, which may include electronic verification of my identity using the information provided, as part of their obligations under the Anti-Money Laundering and Countering Financing of Terrorism Act 2009.

8. I affirm that all information provided in this application is true and correct.

9. If this is a full withdrawal, I understand that my KiwiSaver account will be closed upon full payment, and I agree to release all claims made by me to the Manager and/or Supervisor in relation to my KiwiSaver account.

FULL NAME (FIRST NAME, MIDDLE NAME, SURNAME)

SIGNATURE

DATE

DD / MM / YYYY