

QuayStreet KiwiSaver Scheme

Australian Superannuation Transfer Information Request Form

WHERE TO SEND YOUR COMPLETED FORM

Please either deliver your completed form to the nearest Craigs Investment Partners branch, or post it to:

QuayStreet KiwiSaver Support
PO Box 13155, Tauranga 3141.
Phone: 0800 878 278
Email: kiwistart@craigsip.com

This form provides QuayStreet Asset Management Limited with authority to request information in respect of retirement benefits which may be held on your behalf in Australia.

Form Checklist

Please check that you have provided the following:

- This form with all sections completed, including the Letter of Authority
- A copy of a recent statement from your Australian superannuation scheme

A Your Details

Title *please select one*

Mr Mrs Miss Ms Dr Other _____

Full Name *first, middle and last name*

Mailing Address

Post code | | | | |

Contact Phone _____

Email _____

Date of Birth

| D | D | M | M | Y | Y | Y | Y |

B Taxation

I am a New Zealand citizen or have New Zealand tax residency

Other _____

IRD Number

| | | | | | | | |

CLIENT ACCOUNT NO.

INVESTMENT ADVISER

C Australian Superannuation Details

Australian Tax File Number (TFN) | | | | | | | | | |

Date you left Australia | D | D | | M | M | | Y | Y | Y | Y | Y |

Name of an employer who made Contributions to your Account (if applicable)

Are there any funds originating from a UK Pension Transfer in your current Australian Superannuation scheme?

Yes No *please complete declaration overleaf*

If yes, please provide the following information:

Date you left the UK | D | D | | M | M | | Y | Y | Y | Y | Y |

National Insurance Number

Original funds transfer date | D | D | | M | M | | Y | Y | Y | Y | Y |

D Client Authority

Authorisation to obtain information

I, *full name*

hereby authorise QuayStreet Asset Management Limited (QuayStreet) and its related companies (all "Craigs Investment Partners") to obtain and hold relevant information regarding Australian Superannuation benefits that may be held on my behalf and to assist with a possible transfer to QuayStreet KiwiSaver scheme.

I understand that my personal information may be passed on to the Australian Tax Office (ATO), AusFund, superannuation providers, administrators, auditors, tax advisers, supervisor and custodians or other entities that may assist in finding any of my superannuation benefits and assisting with their withdrawal.

I understand that I may request to see and, if necessary, request the correction of my personal information.

I agree that providing my e-mail address on this form QuayStreet may provide information by e-mail to me regarding this service. I also agree to receiving by e-mail information regarding other products and services of the Craigs Investment Partners group of companies.

I do not wish to receive by e-mail information regarding other products and services of the Craigs Investment Partners group of companies.

I confirm that the details that I have supplied on this form are, to the best of my knowledge, correct.

Signature

Declared at *location*

On | D | D | | M | M | | Y | Y | Y | Y | Y |



Letter of Authority Release of Scheme information

Name of Australian scheme

Australian scheme's Mailing Address

Post code | | | | |

Dear Sir / Madam

Re: Member name *in full*

Investor number

Tax File number (TFN)

Date of birth

| D | D | | M | M | | Y | Y | Y | Y | |

Please accept this letter as my authority for you to release any relevant information regarding Australian Superannuation benefits that may be held on my behalf to QuayStreet Asset Management Limited at the address below:

Australian Superannuation Transfer Administrator
QuayStreet Asset Management Limited
PO Box 13155
158 Cameron Road, Tauranga 3141
New Zealand

My New Zealand contact details are:

Mailing Address

Post code | | | | |

Contact Phone

Email

My previous Australian Mailing Address was:

Mailing Address

Post code | | | | |

Contact Phone

Email

Please do not hesitate to contact me if you require further information.

Yours sincerely,

Signature

Date | D | D | | M | M | | Y | Y | Y | Y | |