

Significant Financial Hardship Withdrawal Form

Income – Enter all income, including details of spouse or partner’s income

Weekly income (after tax)

Salary/wages/pension/drawings	\$
Part-time work	\$
Spouse or partner’s income	\$
Self-employed income	\$
Child support received	\$
Working for Families Tax Credits	\$
Department of Work and Income benefit/superannuation	\$
Rent/board received	\$
Interest/dividends	\$
Other (specify)	\$
	\$

Total weekly income (add all amounts in the column and print total in Box A)

A \$

Expenses – Enter all expenses, including details of spouse or partner’s expenses

Weekly payments

Food/groceries	\$
Rent/board/mortgage	\$
Bus/train/petrol	\$
Childcare/school expenses	\$
Child maintenance payments	\$
Other (specify)	\$
	\$

Total weekly payments (add all amounts in the column and print total in Box B)

B \$

Monthly payments (to convert monthly payments to weekly payments, multiply by 12 and divide by 52 and put this figure in the weekly column)

	MONTHLY	WEEKLY
Gas/electricity	\$	\$
Telephone/mobile	\$	\$
Clothing	\$	\$
Hire purchase payments	\$	\$
Credit cards	\$	\$
Other (specify)	\$	\$

Total monthly payments (add all amounts in the weekly column and print total in Box C)

C \$

Annual payments (to convert annual payments to weekly payments, divide by 52 and put this figure in the weekly column)

	ANNUAL	WEEKLY
Vehicle insurance (e.g. car, boat, caravan)	\$	\$
Vehicle registration/warrant	\$	\$
House and contents insurance	\$	\$
Rates	\$	\$
Medical insurance/expenses	\$	\$
Life insurance/superannuation	\$	\$
Other (specify)	\$	\$

Total annual payments (add all amounts in the weekly column and print total in Box D)

D \$

Calculation: Income (Box A) less expenses (Box B + Box C + Box D) = Balance

\$

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Assets and Liabilities – Enter all business and private assets and liabilities

Assets (show details)

Residential property (market value)		Value	\$
Other property (market value)		Value	\$
Vehicles (e.g. car, boat, caravan)	Model and year	Value	\$
please include registration number	Model and year	Value	\$
	Model and year	Value	\$
Bank accounts	Bank and branch		
	Account number		Balance \$
	Bank and branch		
	Account number		Balance \$
	Bank and branch		
	Account number		Balance \$
Other accounts (e.g. credit union, building society)	Account type	Balance	\$
	Name of debt	Value	\$
Household goods		Value	\$
Life insurance/superannuation	Company	Surrender value	\$
	Company	Surrender value	\$
Money owed	Owed to you by	Value	\$
Other assets	Shares	Value	\$
	Debentures	Value	\$
	Other (e.g. bonus bonds, loans, personal belongings)	Value	\$
Total assets (add all amounts in the right-hand column and print total in Box E)		E	\$

Liabilities/debts (show details)

Mortgages	Bank/institution	Value	\$
	Bank/institution	Value	\$
Loans	Bank/institution	Value	\$
	Bank/institution	Value	\$
Bank overdraft	Bank/institution	Limit	\$
	Bank/institution	Limit	\$
Credit cards	Type	Limit	\$
	Type	Limit	\$
Hire purchases	Item	Balance to pay	\$
	Date purchased	Finish date	
	Item	Balance to pay	\$
	Date purchased	Finish date	
Trade accounts	Account name	Value	\$
	Account name	Value	\$
	Account name	Value	\$
Other debts (e.g. with Dept for Courts, Dept of Work and Income)	Name of debt	Value	\$
	Name of debt	Value	\$
Total liabilities (add all amounts in the right-hand column and print total in Box F)		F	\$

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Privacy Act

Generate Investment Management Limited, Public Trust, any of their authorised agents, and any distributor assisting with the application (each an "Authorised Person") may collect personal information about the member provided in connection with this application or the Scheme, will (or through Aon New Zealand Limited will) hold the information securely and may use the personal information to manage the member's investment in the Scheme, to communicate with the member or to promote other products and services to the member. The member may ask that he or she be shown the information held about the member, and if any of the information is incorrect, ask for it to be corrected. The addresses for Generate Investment Management Limited, Public Trust and Aon New Zealand Limited are set out in the Directory of the investment statement and prospectus for the Scheme.

Statutory Declaration

The KiwiSaver Act 2006 requires that you must make a Statutory Declaration for your early withdrawal.

I solemnly and sincerely declare that I am a member of the Generate KiwiSaver Scheme, and that:

- I am suffering a Significant Financial Hardship as defined in the Act, and I am applying to the Trustee for withdrawal from my Generate KiwiSaver Scheme account as detailed above to be paid to the bank account as specified in this form.
- I understand that acceptance of this application is at the discretion of the Trustee.
- I understand that if I am making a withdrawal for Significant Financial Hardship, the Trustee may direct that the amount withdrawn be limited to a specific amount that the Trustee's opinion, is required to remedy the particular hardship.
- I understand that the Manager and/or Trustee may request additional information from me relating to this application.
- I authorise Generate KiwiSaver Scheme and/or Aon Hewitt Limited to contact any of my former KiwiSaver provider(s) and/or Trustee(s) and authorise the same to disclose and/or provide any information required in so far as it related to any previous claims I have made under a significant financial hardship application.
- I understand that my withdrawal value will or might fluctuate based on the unit price(s) which applies when the withdrawal is processed and that fees, taxes and expenses may be deducted from my Generate KiwiSaver Scheme account.
- The information given in this form is true and correct. I acknowledge that the Manager and the Trustee of the Generate KiwiSaver Scheme will rely on information provided in (or in connection with) this form and accordingly agree to indemnify them against and claims, liability, losses, damages, costs and expenses whatsoever which may arise directly or indirectly as a result of any information provided in (or in connection with) this form being untrue or misleading (including omission).
- I understand that the Manager and/or Trustee of the Generate KiwiSaver Scheme will not be able to complete its assessment of this application if the information given in this form is incomplete or incorrect.
- I have read the Privacy Statement in this form.

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

Your Signature _____

Declared at _____ Address _____ this _____ Date _____ of _____ Month _____ 20 _____ Year _____

Before me _____ (name)

In my capacity as a Justice of the Peace, Solicitor, Notary Public or other person authorised to take a statutory declaration.

Signature _____

Where do I send my application to?

Email return: Please scan this application and all supporting documentation and email them to us at info@generatekiwisaver.co.nz or

Postal return: Please send this application and any supporting documentation to: Generate KiwiSaver Scheme, PO Box 91609, Victoria Street West, Auckland 1142