

This form is only to be used for subsequent retirement withdrawals from your SuperLife KiwiSaver Scheme account. If this is your first retirement withdrawal, you will need to complete the SuperLife KiwiSaver Scheme Initial Retirement Benefit Request Form, which can be found at superlife.co.nz/resources/forms.

Please complete all the sections in the form. Either email the completed form to superlife@superlife.co.nz or post it to us at Freepost Authority SuperLife P.O. Box 105262, Auckland City 1143. If you need help with the form, or are unsure if you've made a withdrawal from your SuperLife KiwiSaver Scheme before, please call us on 0800 27 87 37.

REACHING RETIREMENT AGE

When you reach your KiwiSaver retirement age, you can request a withdrawal of all or part of your KiwiSaver savings. You can request your funds as a single lump sum or as a series of payments. Payments may be regular or as required. With SuperLife you can also have your funds transferred to the SuperLife Invest Scheme. Contact us to find out more about SuperLife Invest.

KiwiSaver retirement age

You are eligible to withdraw your KiwiSaver funds when you reach the superannuation age, currently 65.

You can choose to continue contributing to your KiwiSaver, or not, after you attain age 65. Your employer (if any) is no longer required to contribute once you reach the retirement age. Some employers will continue to contribute. Check with your employer to find out the company's rules.

Stopping your KiwiSaver contributions

If you receive a salary or wage and want to stop making contributions, fill in a non-deduction notice (KS51) and give it to your employer.

Restarting your contributions

If you are still a KiwiSaver member you can start contributing again whenever you like. Complete a KiwiSaver deduction form (KS2) and give it to your employer. If you close your KiwiSaver account but wish to contribute again in the future you must sign up with your chosen provider otherwise you will be allocated to a KiwiSaver Default Provider by Inland Revenue.

Confirmation of your Withdrawal

For security reasons, we may request further information from you including ID and Address verification, and a verbal confirmation.

Timing of payments

Once your retirement benefit has been processed, it can take up to three business days for funds to be available in your nominated account. Payments will not be made to a third party. You must be a named owner of the account and have authorisation to operate the account either individually or jointly.

SECTION 1: YOUR DETAILS

IRD number (Must be supplied)

Title (Mr, Mrs, Miss, Ms, Mx, Dr or Other)

Date of birth

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First name

Surname

Home phone

Work phone

Mobile

Email

Residential address

Street address

Suburb

Town/city

Country

Postcode

SECTION 2: BENEFIT DETAILS - ONLY COMPLETE ONE OPTION

OPTION 1: I WANT TO WITHDRAW MY ENTIRE ACCOUNT BALANCE

I want to withdraw my entire SuperLife KiwiSaver balance and close my account

OPTION 2: I WANT TO TRANSFER TO SUPERLIFE INVEST

I want to withdraw my entire SuperLife KiwiSaver balance and transfer them to the SuperLife Invest scheme

I confirm that I have received the SuperLife Invest product disclosure statement, any relevant fund updates and wish to apply to join SuperLife Invest.

I understand that SuperLife will send me statements and other communication materials unless I request otherwise

SuperLife will transfer your SuperLife KiwiSaver Scheme account balance to a SuperLife Invest account and implement the same investment strategy as your SuperLife KiwiSaver Scheme account. You can change this at anytime, free of charge, via your online account at my.superlife.co.nz or by completing a "change investment strategy" form, which you can request from us.

OPTION 3: I WANT TO SET UP A REGULAR WITHDRAWAL

I want my savings to be paid to me on a regular basis.

Please pay me

Every

\$

☐ Week

☐ Fortnight

☐ Month

☐ Quarter

☐ Six Monthly

Starting date

OPTION 4: I WANT A PARTIAL PAYMENT

If you do not wish to name specific funds only enter a value under 'total'

I want to withdraw the following amount(s) from the following fund(s)

Fund:

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| |
| |
| |
| |
| |

Amount:

\$

\$

\$

\$

\$

Total:

\$

If you do not specify the funds to withdraw from, we will use the default order. This means funds will be taken from the funds that your account is invested in starting with the cash options, then the bonds, the property and finally the shares as the Manager determines. This will mean that your share assets are realised last. If you have not withdrawn all of your balance, you may have an overweight exposure to shares. You should also review your investment strategy to make sure that it is appropriate after each payment.

SECTION 3: BANK ACCOUNT DETAILS

Please provide bank account evidence with your application such as a bank statement, pre-printed deposit slip or stamped account confirmation. Payments will not be made to a third party. You must be a named owner of the account and have authorisation to operate the account either individually or jointly.

Name of bank

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Name of bank account holder

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Account number

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Bank

Branch

Account number

Suffix

SECTION 4: PRIVACY

I understand that this form collects personal information that is needed to withdraw savings from my SuperLife KiwiSaver Scheme account. All the information collected is held by the Scheme's licensed manager, Smartshares Ltd, PO Box 105262, Auckland City 1143.

The information in this application form, and any information you provide us at later dates, will be collected, used, stored and disclosed as set out in our privacy policy at superlife.co.nz/legal/privacy-policy.

Signature

Date

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