



### Definition of Permanent Incapacity

Permanent Incapacity means a permanent physical or mental incapacity which the Trustee, after considering the advice of a registered medical practitioner, considers will result in you being unlikely to have a significant earning capacity in the future. The information contained within this form will be used by Mercer and the Trustee to determine whether or not you meet the criteria for a claim based on Permanent Incapacity, as defined.

If you do not meet the requirements for a withdrawal on the grounds of Permanent Incapacity, but your illness is causing significant financial hardship, you may still make a claim on the basis of 'Significant Financial Hardship' by completing the Significant Financial Hardship claim form, available on [www.mffunds.co.nz](http://www.mffunds.co.nz).

### Decision

Mercer will make a decision whether or not to approve your claim. Mercer may require further information from you. If your claim is approved, you will be advised and payment will be made in accordance with your instructions.

### Privacy statement

Information in this form and any requested documents are being collected to enable administration of this account. The Privacy Act entitles the account holder to access and to request correction of any personal information.

If you need help completing this form, please call us on **0800 207 207**.

Please print in black or blue pen, in uppercase, one character per box and all that apply.

### Procedure for completing this form

You must complete this form personally.

**1. Complete your personal details, how you would like to receive payment and the amount you would like to withdraw**

Steps 1 and 2 of the form must be completed by you.

**2. Confirm your identity**

**3. Complete the statutory declaration**

The statutory declaration (Step 4) must be made in front of a lawyer, Justice of the Peace, Notary Public or other person authorised to take statutory declarations.

**4. Ask your doctor to complete the 'Medical section'**

### Step 1 – Complete your personal details

Membership number

IRD number

Title: Mr  Mrs  Ms  Miss  Other

Date of birth

First name

Middle name(s)

Surname

#### Residential address

Number	Street name
Suburb	
City	Postcode
Country	

#### Mailing address (if different from residential address)

Number	Street name
Suburb	
City	Postcode
Country	

#### Telephone

Mobile

Daytime

Email

## Step 2 – Withdrawal amount and payment instructions

### A Amount of withdrawal

I apply to:

- withdraw the full amount of my accumulated funds.  
By choosing this option, I agree that Mercer will close my account.

**OR**

- make a partial withdrawal from my accumulated funds: \$

Once the Trustee is satisfied that you're eligible, your investment will be paid either as a lump sum or in several payments, as decided by the Trustee.

### B Payment instruction

- I authorise my funds to be credited to my bank account and attach a bank encoded deposit slip or copy of a bank statement printout.

 To enable your savings to be credited to your bank account, you must provide details of a personal account in your name. Business accounts, family trust accounts and accounts of another person will not be accepted.

## Step 3 – Confirming your identity

If you have confirmed your identity with Mercer previously and your details haven't changed, please go to Step 4.

 Copies of your documents can be certified by one of the following: Justice of the Peace, Solicitor, Notary Public or Member of Parliament. For a full list of certifiers and acceptable documents and how these can be certified, please read the Confirmation of Identity Guide available on [www.mflfunds.co.nz](http://www.mflfunds.co.nz). Certified documents are only valid for three months.

 To the certifier: The certifier must view the original document(s) (not a fax, photocopy or scan) before writing their **Full Name, Occupation, Date** and **Signature** and make a statement to the effect that the document(s) provided are a true copy and represent the identity of the named individual.

Your withdrawal request must be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

### Option 1 – Electronic identity verification

Mercer as the Administration Manager has the ability to electronically verify your identity. Once we have received your withdrawal request, we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification, you must have a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following:

**New Zealand Passport**

**OR**

**New Zealand Driver Licence**

If this method of identification is unsuccessful, you will be required to provide certified ID.

### Option 2 – Certified copies of identity documents

Please provide a certified copy of your identity documents. Refer below for information on acceptable identity documents and who can certify them.

**Preferred identification method** – please select one of the following options:

- Option 1 – I would like the Administration Manager to electronically verify my identity  
 Option 2 – I would like to provide the Administration Manager with certified copies of my identity documents

If you have selected Option 1, you do not need to provide certified ID now.

### Provide a certified photocopy of current and valid documents.

If you selected Option 2 as your preferred way for us to verify your identity, please select one of the certified identification options below.

We are only able to accept original certified copies of certified ID (i.e. the copy that has been physically certified).

These documents must be posted to us - our postal address is Mercer (N.Z.) Limited, PO Box 1849, Wellington 6140, New Zealand.

If your name has changed, please provide evidence of your name change which links your previous and current names.

- A** A certified photocopy of **ONE** of:
- A New Zealand or an overseas passport; or
  - A New Zealand firearms licence; or
  - A New Zealand Certificate of Identity\*; or
  - A New Zealand refugee travel document; or
  - An emergency travel document; or
  - An overseas government national identity card (appropriate pages containing name, date of birth, photograph and signature)

- B** A certified photocopy of **ONE** of:
- A New Zealand or an overseas driver licence; or
  - A Kiwi Access Card (previously known as 18+ Card)
- Plus**  
A certified photocopy of **ONE** of:
- A New Zealand or an overseas birth certificate; or
  - A New Zealand or an overseas citizenship certificate

- C** A certified photocopy of **ONE** of:
- A New Zealand or an overseas driver licence
- Plus**  
A certified photocopy of **ONE** of:
- A (Super) Gold Card; or
  - A Community Services Card; or
  - A bank account or a credit card statement issued by a New Zealand registered bank in the 12 months preceding the date of the application; or
  - A statement issued by Inland Revenue or another government agency in the 12 months preceding the date of the application

\* Please visit [passports.govt.nz](https://passports.govt.nz) to read more about this ID document.  
A Gold Card is NOT considered a type of a New Zealand Certificate of Identity.



**How to have your ID correctly certified**

**Photocopy ID at 150%** so the details are legible.

Please do not send in your physical identity documents e.g. passport, driver licence, birth certificate etc.

I certify this to be a true copy of the original document and confirm it represents the identity of Joe Smith.

Name: **Jane Doe**  
Occupation: **Justice of the Peace**  
Date: **18/04/2024**  
Signature:

**Please note:** Certification is valid for three months and must have been carried out within three months of this application. Your identity documents must be certified by one of the following people: Justice of the Peace, Registered Lawyer, Chartered Accountant, Registered Teacher, Registered Doctor, Police Officer, Notary Public, Registrar/Deputy Registrar. Please refer to the Confirmation of Identity Guide.

Membership number

### Step 4 – Statutory declaration by the member

I,  (Full name), of  (Address)  
 (Address),  (Occupation)

**solemnly and sincerely declare that:**

- I am entitled to make this claim and that all the information which I have provided in this form and in all included materials is true and correct.
- by receiving payment of the claim, I release all claims that have been made or may be made on Mercer (N.Z.) Limited and the Trustee.
- I have read and understood the information regarding the Privacy Act 2020.

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

Signature of member  X

Declared at  (Location) this  (Day) day of  (Month) 20  (Year)

Before me (please print full name)   
*Lawyer, Justice of the Peace, Notary Public or other person authorised to take statutory declarations.*

Address

Occupation

Signature  X

Membership number

## Medical section – Doctor’s certification of Permanent Incapacity

(your doctor will need to complete this section)

### Patient details

First name

Surname

### Patient’s address

Number

Street name

Suburb

City

Postcode

### Doctor details

I, Dr , of

Print full name

Address

Day time telephone

Mobile

Email

### Certify that:

- I am a registered medical practitioner with the Medical Council of New Zealand.
- the above-named is a patient of mine and I have recently given him/her a full medical examination.
- in my opinion, the above named individual is of:
  - permanent physical incapacity
  - permanent mental incapacity

to an extent that the individual is unlikely to have a significant earning capacity in the future.

I form this opinion based on (give a brief description of the patient’s condition):

Signed and stamped by the Doctor

X

Date  /  /



### Please return your completed application to:

Mercer (N.Z.) Limited, Freepost Authority Number 3629,  
PO Box 1849, Wellington 6140. Alternatively, you can email  
your fully completed application form to [mfl@mercero.com](mailto:mfl@mercero.com).