



**Determining your eligibility**

You become eligible to withdraw your savings when you turn 60 years old.

**Processing times**

Once we receive your fully completed form and your eligibility has been confirmed, your savings will be paid out depending on the processing times listed in Step 2.

**Account closure**

Please note that your account will be closed once the full amount of your accumulated funds has been paid out.

**Privacy statement**

Information in this form and any requested documents are being collected to enable administration of this account.

The Administration Manager abides by the Privacy Act 2020, and you have the right to access and request correction of personal information held about you.

## Step 1 – Identity

In this section we need to confirm that you are who you say you are, and the below information must match our records. You can check the information we hold for you when you sign in to your account at [www.mffunds.co.nz](http://www.mffunds.co.nz).

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

Home phone

Evening

Email

## Step 2 – Withdrawal amount payment instructions

I authorise my funds to be credited to my bank account and attach a 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.

### Amount of withdrawal

Subject to the requirements of the trust deed, I request:

a **partial** withdrawal of \$           (a maximum of four partial withdrawals can be made per calendar year with a minimum amount of \$500 per withdrawal)

a **regular** monthly withdrawal of \$

a withdrawal of my **full** balance and closure of my account (please proceed to the next step)

 Your account balance must remain above \$1,000 after a partial or a regular monthly withdrawal, otherwise the full amount will be paid out and your account will be closed.

For regular monthly withdrawals, the first and subsequent payments will be processed on the 20th of each month following this request being received and processed. If the 20th falls on weekend or a public holiday, payment will be processed on the next business day.

For a partial withdrawal, payments may take up to five business days to process from when we receive the required withdrawal form.

If you make a full withdrawal from your account, you will no longer be a member in the Scheme and your account will be closed.

In order to calculate your withdrawal amount, we will use the unit prices available at the time we process the withdrawal.

**If applicable, please remember to cancel direct debits or automatic payments to your account.**

## 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. Mercer members who are supplying overseas identity documents must also provide proof of New Zealand residency.

**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

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.
- I have read the privacy information at the beginning of this form.
- I understand that should the information given in this form be incomplete or incorrect, the Administration Manager will not be able to complete its assessment of this application without receiving complete and correct information.
- I consent to the use of the personal information provided in this form by the Administration Manager so that they can assess and process my requested withdrawal. I understand that access to and correction of my personal information may be requested by me.
- I understand that if I withdraw my total account balance that my account will be closed.
- I understand that my withdrawal value will be based on the unit prices available at the time the Administration Manager processes the withdrawal.
- Any changes noted in this form will amend any existing retirement withdrawal instructions (if applicable).

**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

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

Before me (please print full name)  Person authorised to take statutory declarations  Please specify office held   
Signature

### Checklist

Please tick  that you have completed the form correctly:

- Entered your relevant details and requirements in Steps 1 and 2
- Included a bank encoded deposit slip or a copy of your bank statement
- Included photocopied and certified documents as per Step 3
- Completed the statutory declaration in Step 4 and have had your signature witnessed

Please return your completed form 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@mercerc.com](mailto:mfl@mercerc.com).