

Use this form: To make a first home withdrawal from the JMI Wealth KiwiSaver Scheme. Send this completed form by email to contact@myjmiwealthkiwisaver.co.nz or post to PO Box 105262, Auckland City, Auckland 1143.

If you have not previously provided documents that verify your identity and your address to the JMI Wealth KiwiSaver Scheme as required by the Anti-Money Laundering and Countering Financing of Terrorism Act 2009, you will need to provide it before a payment can be made.

JK005 – 22.03.2024

Your details

IRD number - -

Name: ("the Member")

Date of birth: (dd/mm/yyyy) Phone: ()

Current address: Post code:

Email:

Details of first home purchase

Address: Post code:

Purchase date: (dd/mm/yyyy)

Member declaration

(tick and complete as appropriate)

- A. I confirm that this withdrawal will be used to purchase a house which will be my principal place of residence.
- B. I confirm that the withdrawal is for me to purchase my first home.
If you are purchasing an interest in a house on Maori land, you also need to provide evidence of your right to occupy the Maori land.
- or I attach a certificate from Housing New Zealand (HNZ) confirming that I am in the same position as a first home buyer.
- C. I confirm that I am personally the buyer or one of the buyers of the house and I am not acting in a capacity as a trustee of a family trust.
- D. I want to withdraw: the maximum amount possible; or \$

Principal place of residence

I confirm that for the period which I have been a member of KiwiSaver, my principal place of residence was:

- Always in New Zealand
- New Zealand, except for the following periods:

| From | To |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |

Note: do not include periods that you were overseas on holiday if NZ was still your principal place of residence.

Give this form to your solicitor and ask them to complete the declaration over the page.

Member's name: _____

Statutory declaration

I, (full name)
(Declarant)

Address

Occupation

Solemnly and sincerely declare, that:

All the documents attached in support of my application are a true and correct record of my first home withdrawal.

That for the period of my KiwiSaver membership, my principal place of residence was New Zealand except as specified in this application.

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

Signature of Declarant (your signature) _____

Witness¹

Declared at

this

day of

20

Before me

¹ A Justice of the Peace, or other person (e.g. notary public, solicitor, officer of the court) authorised to take and receive Statutory Declarations

Solicitor's declaration

Name of Solicitor: _____

Firm: _____

Address: _____

Post code: _____

Email: _____

Phone: () _____

As the legal representative for the Member, I confirm (each must be ticked):

- A copy of the sale and purchase agreement is attached. This confirms that the Member is the purchaser in his/her own right and not as a trustee of a family trust.
- The agreement for purchase is unconditional or expected to go unconditional on: _____
- The funds will be paid to the seller as part of the purchase price or, if the settlement is not completed by the due date (or any extended date), will be repaid to Member's KiwiSaver Account under the JMI Wealth KiwiSaver Scheme.
- The property being purchased is the Member's first home, or the Member qualifies for a first home withdrawal under a HNZ certificate.
- The property is in New Zealand.
- The property being purchased will be the 'principal place of residence' of the Member.
- Funds should be paid to our solicitor's trust account. Please include a copy of the deposit slip as confirmation of bank account. Details are:

Account name: _____

Bank name: _____

Branch name: _____

Account number: _____ - _____ - _____ - _____

Signed by Solicitor: _____

Date: _____