Benefit Request Form

Please complete this form if you wish to take your retirement benefits from the IVCM (NZ) PIE Superannuation Fund by regular, partial or full withdrawal.

You are eligible to withdraw this money when you have reached the normal minimum pension age under UK tax rules currently aged 55.

1. Personal Details

Policy / Member number

IRD number

Date of birth [dd/mm/yy]

Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Name [first name, middle, surname]

Address

Postcode

Home number Mobile number

Email

2. New Zealand Bank Account Details

Name of Bank Account

Bank Account number

Bank | Branch | Account number | Suffix

If you hold New Zealand Bank Account Details the payment will be paid in New Zealand Dollars.

3. International Bank Account Details (Bank Accounts outside New Zealand)

Payee

IBAN / Account number

Intermediary bank / Swift code

Please select the currency of your bank account: AUD ☐ GBP ☐ NZD ☐ USD ☐

T. +64 (0) 4 888 1430
F. +61 (0) 8 8178 0257
E. newzealand@ivcm.com
www.ivcm.com

IVCM (Aust) Pty Ltd
Level 5, 20 Bond Street,
Sydney, NSW 2000
Australia

When complete email this form to; newzealand@ivcm.com and post the original to the address shown.

4. Benefit Request & Information

Pension Commencement Lump Sum (Tax Free Cash)

What Pension Commencement Lump Sum amount do you require?

25% ☐ None ☐ Specified Amount ☐

Income Stream

Please select and complete only one section, Regular, Partial, or Full Withdrawal.

Regular Withdrawal

☐ I would like to request the following regular income payment of £

At what frequency would you like your income paid? Monthly ☐ Quarterly ☐ Annually ☐

Start date [dd/mm/yy] ☐

Please note that we require 20 business days notice before we can set up and paid the first income payment or

Partial Withdrawal

☐ A partial withdrawal of £

Full Withdrawal

☐ I would like to fully surrender my IVCM (NZ) PIE Superannuation Fund and close my account after the deduction of any fees and taxes.

PLEASE NOTE:

If there is insufficient cash in your IVCM (NZ) PIE Superannuation Fund account it may mean that your income payments cannot be paid on time. Your account does not have an overdraft facility.

Retirement on the grounds of Ill Health

Are you taking benefits before age 55 on the grounds of ill health?

Yes ☐ No ☐

If yes please submit evidence from a registered medical practitioner that you are unable to carry out your current occupation and will be unable to return to that occupation. (The Scheme Rules can extend this rule to any occupation).

Please Note: Registered Medical Practitioner overseas (outside UK) may also be interpreted for the purpose of tax rules as including a certificate from someone with equivalent overseas (outside UK) qualifications.

Disinvestments Instruction

Please complete the below disinvestment instruction so cash is available for your pension payment to be made as instructed in this Benefit Request Form:

Fund Name	Currency	Amount to Disinvest

We will instruct the sale of the above after completion of the benefit calculation. Under normal market conditions, we allow 15 working days as a guideline for fund payment. This can take longer under certain market conditions.

Please note that sale instructions may incur a redemption fee. IVCM will need to be satisfied that the client is fully aware of all charges before redemption is provided.

Tax Residency Declaration

PLEASE NOTE: Information in this section is to help IVCM (NZ) PIE Superannuation Fund on any HMRC reporting aspects.

Are you currently a resident in the UK for tax purposes? Yes ☐ No ☐

(Please Note: It is possible to be resident for tax purposes in more than one country at the same time. This is known as dual residence).

Have you ever been resident in the UK for tax purposes? Yes ☐ No ☐

If yes please provide the date you left the UK?

Date [dd/mm/yy] _____

National Insurance Details

Have you ever been provided with a National Insurance Number?

Yes ☐ No ☐

National Insurance Number (NINO) _____

PLEASE NOTE: If you have lost or cannot remember your NINO you will be required to fill in and return a CA5403 (available on HMRC website) or phone National Insurance Registrations Helpline on 0300 200 3502 before returning this form.

Where member isn't entitled to National Insurance Number

☐ I am not entitled to a NINO

Reason why you are not entitled to a NINO

Any other Tax reference numbers that represent you

I hereby confirm that I am not a UK resident for tax purposes and have been a non- UK resident for

☐ full complete tax years.

I am currently a resident in _____ for tax purposes.

Declaration

- I declare that to the best of my knowledge and belief the information given on this notification is correct and complete.
- I acknowledge that I have flexibly accessed my pension rights under an overseas scheme which has triggered the MPAA rule. I therefore have 91 days to inform any other pension provider I have done so.
- I agree that if my jurisdiction changes, I shall inform IVCM (NZ) PIE Superannuation Fund by completing an APSS241 form.
- I accept it is an offence to make false statements and that the penalties are severe and could lead to prosecution.
- I acknowledge and accept the information within this form and service provided under it do not extend to any financial or tax advice.

Member Signature

Date

A scanned version, or digitally signed version of the Benefit Request Form will be accepted.

Please provide supporting documents for benefits to be paid, these can be found in our Benefit Request verification and certification of identity guide.