



Kiwisaver Withdrawal Checklist

- Save this document as a copy to your desktop / Google Drive
- Make sure you follow the steps outlined below
- Tick off each step as you complete it - see far right-hand column
- Timing with your Kiwisaver withdrawal is important - make sure you complete each step as soon as you can
- If you have worked overseas, please make sure you allow up to 15 working days to withdraw your Kiwisaver.
- If you have only worked in NZ, you will need up to 10 working days to withdraw your Kiwisaver.
- You cannot use your Kiwisaver to pay the deposit at an auction
- You can use your Kiwisaver to pay the deposit for an auction (but it can be tricky)
- Please email me or call me if you have any questions



HouseMe Legal



Client

Step	Kiwisaver Tasks	Whose job is it to do this?	Comment / Link to Complete the Task	Done? ✓
0	Make sure you know who your Kiwisaver provider is and what their email address is		All of the main Kiwisaver provider's details can be found here. You can download your withdrawal form from this document.	<input type="checkbox"/>
1	You need to send the initial email to your Kiwisaver provider		Read this document if you want to find out How to withdraw your Kiwisaver. Your template email to go to your Kiwisaver provider is here	<input type="checkbox"/>
2	Receive your indicative figure from your Kiwisaver provider and add it to your budget		Save this spreadsheet to your computer and start filling out the spreadsheet (where applicable) Important Tip: Make sure you note that \$1,000 will remain in your account.	<input type="checkbox"/>

Until you have a signed sale and purchase agreement, you need to wait. You may want to move your Kiwisaver fund to a less risky fund. Speak to a financial advisor.

3	Send the signed sale and purchase agreement to your lawyer		<p>Follow this process</p> <p>Send the agreement to Angus</p> <p>Important Tip: Make sure the seller/vendor has signed the agreement too.</p>	<input type="checkbox"/>
4	Download the first home withdrawal form from your Kiwisaver provider's website		<p>Complete the first form withdrawal</p> <ol style="list-style-type: none"> 1. Under the Solicitor's details, write Angus Grayson HouseMe Legal Limited Level 2, 1 Broadway, Newmarket Auckland 2. Make sure you tick the correct withdrawal option: <ol style="list-style-type: none"> a. Agreement is conditional. b. Agreement is unconditional. <p>Important Tip: Watch out for the section that says conditional vs unconditional. These sections can look very similar.</p>	<input type="checkbox"/>
5	Make sure your passport has been signed in the top left corner and scan a copy of your passport to Angus		<p>Take a photo of your passport</p> <p>Important Tips: Make sure all of the passport is in the photo and nothing has been cut off <i>and</i> your passport has been signed</p> <p>Ideally use the scan function on your iPhone</p> <p>Send this to Angus</p>	<input type="checkbox"/>
6A	If you are based in Auckland, please book an in-person meeting for Angus to certify your documents and witness your statutory declaration		<p>Click here to book a meeting</p> <p>Level 2, 1 Broadway, Newmarket, Auckland.</p>	<input type="checkbox"/>
6B	If you are not based in Auckland, please sign and declare your application in front of one of these persons.		<p>Full list of people who can witness your Kiwisaver declaration.</p>	<input type="checkbox"/>

<p>7</p>	<p>Make sure your passport has been certified correctly</p> <p><u>If you completed HouseMe Legal's on-boarding form correctly, I should already have this document</u></p>	 	<p>The wording next to your passport needs to say</p> <p><i>I certify this to be a true copy of the original, which I have sighted, and the photo represents a true likeness of [client's name].</i></p> <p><i>Angus Anthony Grayson</i></p> <p><i>Solicitor</i></p> <p><i>HouseMe Legal Limited</i></p> <p><i>Auckland</i></p> <p><i>Dated</i></p>	<input type="checkbox"/>
<p>8</p>	<p>Make sure your proof of address has been certified correctly</p> <p>Proof of address should be from a utility provider, your bank etc.</p> <p><u>If you completed HouseMe Legal's on-boarding form correctly, I should already have this document</u></p>	 	<p>The wording on your proof of address needs to say</p> <p><i>I certify this to be a true copy of the original, which I have sighted</i></p> <p><i>Angus Anthony Grayson</i></p> <p><i>Solicitor</i></p> <p><i>HouseMe Legal Limited</i></p> <p><i>Auckland</i></p> <p><i>Dated</i></p>	<input type="checkbox"/>
<p>9</p>	<p>Do not sign the statutory declaration until you are in person with Angus or in front of one of these people (click here)</p>		<p>This is the most common mistake people will make</p> <p>Your lawyer needs to witness your signature and ask you to make the statutory declaration</p> <p>Important Tip: Make sure your signature matches the signature in your passport</p>	<input type="checkbox"/>

10	Your lawyer will email all the required documents to your Kiwisaver provider		Documents that are normally emailed are: <ol style="list-style-type: none">1. Your certified passport2. Your certified proof of address3. HouseMe Legal's trust account details4. Your signed sale and purchase Agreement5. Your Kiwisaver withdrawal form (this includes the solicitor's certificate and your statutory declaration)	<input type="checkbox"/>
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