

# Panorama Super transfer to a KiwiSaver scheme



Use this form to:

**Close your Panorama Super account and transfer your entire superannuation benefit to your KiwiSaver scheme.**

Please ensure that all investments on the account are sold down prior to submitting this form.

Please note: we cannot transfer your Panorama Super account to a KiwiSaver scheme if your super benefit is currently being paid to you as a pension. For more information, please speak to your adviser or contact us on 1300 881 716.

You can type directly into the form and print before signing. Alternatively, print and complete in block letters using a blue or black pen. Place a cross in boxes where applicable.

## Important information

Check that your KiwiSaver scheme can accept this transfer.

Before requesting this transfer and closing your Panorama Super account, please contact your adviser to discuss the changes to your account and the effect this transfer will have on your superannuation benefit. You should also refer to the current Panorama Super Product Disclosure Statement and Additional Information Booklet for information on the effects transferring your benefit will have and the options available. If you require any further information regarding the transfer of your superannuation benefit, please contact us on 1300 554 942.

**Important:** If you withdraw your entire superannuation benefit you will lose any insurance you currently have. This information is intended as a guide only and does not constitute advice. Before making a withdrawal you should speak to your financial adviser about the impacts this could have on your insurance entitlements.

Your request will be finalised within approximately 30 working days once all requirements are received. In certain circumstances, for example, if an investment is suspended or has withdrawal restrictions, the time taken for your request to be finalised may take much longer.

## Privacy Statement and Consent Request

### Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at [www.bt.com.au/personal/help/privacy/privacy-statement](http://www.bt.com.au/personal/help/privacy/privacy-statement) or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

### Your Consent

By signing below, you consent to us collecting and holding any sensitive information such as health information or information about your racial or ethnic origin which appears on copies of your identity documents. You will not be able to withdraw your consent to us holding this information after it has been provided because we are required to retain copies of identification documents under the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth).



## Account and personal details

Account number

Date of birth (dd/mm/yyyy)

Title

Mr Mrs Ms Miss Dr

First name

Last name

Other given name(s)

Male Female

### New Zealand details

Member Inland Revenue Department (IRD) number

### New Zealand residential address

Residential address (cannot be a PO Box)

Suburb

Postcode

### New Zealand postal address

Same as residential address



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## Panorama Super transfer to a KiwiSaver scheme

Postal address

Reference Number (if applicable)

Suburb

Postcode

**KiwiSaver Fund bank details**

Account Name

Last known Australian address

IBAN/Account Number

Suburb

Postcode

SWIFT/BIC Code

Primary mobile (include country and area codes)

**Important:**

Please ensure you have advised your KiwiSaver fund that you want to transfer an Australian Superannuation benefit account (Panorama Super) to a KiwiSaver account by direct credit to the bank account details above. We may require further proof from your KiwiSaver fund to confirm the transfer details above.

Primary email (do not use a generic office email address)

### 2 Your KiwiSaver account details

I request that my entire superannuation benefit held in my BT Panorama Super account (as detailed in section 1) be transferred to my KiwiSaver scheme account detailed below.

Name of KiwiSaver scheme

Postal address of KiwiSaver scheme

Registered address

Suburb

Postcode

KiwiSaver registration number

(To locate this number refer to your scheme provider or the NZ government KiwiSaver Schemes Register)

Member KiwiSaver account number

### 3 Personal tax deduction notice

Do you wish to claim or vary a tax deduction for personal contributions made in the current or previous financial year?

**Important:** you can *only* select one option below.

I do not intend to claim or vary a tax deduction for personal contributions made to my account prior to this withdrawal.

I intend to claim or vary a tax deduction for personal contributions made to my account prior to this withdrawal.

**Important:**

- A deduction notice can be completed or varied online at [panorama.com.au](https://panorama.com.au) on the Rollovers & contributions page.
- If you do not complete a personal tax notice before your partial withdrawal, your ability to claim a tax deduction for personal contributions previously made to your account will be limited. Your ability to vary any previous deduction notices you may have provided will also be limited.
- If section 3 is not completed, you confirm you have already claimed or do not intend to claim a personal tax deduction notice for these contributions.



## Panorama Super transfer to a KiwiSaver scheme

### 4 Statutory declaration

This must be signed by a certified witness. See 'Completing proof of identity' for information.

#### Commonwealth of Australia Statutory Declaration – Statutory Declarations Act 1959

I (insert your full name)

of (insert current New Zealand address)

Suburb

Postcode

make the following declaration under the Statutory Declarations Act 1959;

1. I have permanently emigrated from Australia to New Zealand and request that my Panorama Super account benefit be transferred to the account stated in section 2.
2. I understand that a person who intentionally makes a false statement in a statutory declaration is guilty of an offence under section 11 of the Statutory Declarations Act 1959, and I believe that the statements in this declaration are true in every particular.

#### Signature of person making this declaration

(Wet (pen) signature required)

Date (dd/mm/yyyy)

#### Personal details of certified witness signature of person before whom this declaration is being made

Witness's first name

Witness's last name

Street address / PO Box (your current New Zealand address)

Suburb

Postcode

Date of birth (dd/mm/yyyy)

#### Qualification of witness

Place (where is the declaration being made?)

Signature of witness (Wet (pen) signature required)

Date (dd/mm/yyyy)

#### Note:

As you are residing overseas, BT will only accept the following witnesses on a Commonwealth of Australia Statutory Declaration:

- An Australian Consular Officer;
- An Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1995); or
- A person listed as an authorised witness and who holds a current Australian qualification, licence or registration (eg Australian doctor or lawyer working overseas). A copy of the person's credentials must be supplied.

### 5 Declaration and signature

By signing this form I declare and acknowledge the following statements:

- I declare I have fully read this form and the information I have provided is true and correct.
- I request and consent to the transfer of my whole superannuation benefit, as described above, and authorise the superannuation provider of each fund to give effect to this transfer.
- I authorise the Trustee to act on my behalf in arranging and receiving information on this transfer.
- I acknowledge that all assets held through my Panorama Super account are required to be sold down down to enable this transfer to proceed.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits such as the loss of any insurance, and have obtained or do not require such information.
- I discharge the Trustee from all further liability in respect of the benefits paid and transferred to my KiwiSaver scheme.
- I have emigrated permanently to New Zealand.
- My KiwiSaver scheme described in section 2 will accept the transfer of my Australian superannuation benefits.
- I have completed the Commonwealth of Australia Statutory Declaration which states that I have migrated permanently to New Zealand, and has been witnessed by a person who is authorised to do so.
- I have attached one piece of evidence, no more than 12 months old, as proof of my residence at a New Zealand address following my emigration to New Zealand.
- I agree to the consents in the Privacy Statement and Consent Request section.



## Panorama Super transfer to a KiwiSaver scheme

Full name (please print)

Member signature ([Wet \(pen\) signature](#) required)

Date (dd/mm/yyyy)

**You can submit this form by:**



mail: BT Panorama,  
GPO Box 2861, Adelaide SA 5001

### Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom the super entitlements belong. Your identification documents may be verified by the fund through an electronic service provided by the Government of Australia.

#### Acceptable documents

**Important:** select *two* options below.

Foreign passport or travel document issued by a foreign government, the United Nations, or an agency of the United Nations (must not be cancelled, defaced or mutilated) which contains either a signature OR a unique identifier of the person\*

Foreign driver's licence/permit that contains a photograph of the person in whose name it is issued and the individual's date of birth\*

National identity card issued by a foreign government, the United Nations or an agency of the United Nations which contains either a signature OR a unique identifier of the person\*

\* Documents that are written in a language that is not English must be accompanied by an English translation prepared by National Accreditation Authority for Translators and Interpreters (NAATI) translator.

#### Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you need to provide a certified linking document. A linking document is a document that proves a relationship exists between two or more names.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

### Certification of personal documents

To certify a document, take the original document and a photocopy to one of the people listed below (eligible certifiers) and ask them to certify that the photocopy is a true and correct copy of the original document.

The eligible certifier will need to print their name, date and the capacity in which they are signing (eg Magistrate, Accountant). Sample wording is provided below.

I, [full name of authorised certifier], as [select appropriate person from authorised list below], certify that this [name of document] is a true and correct copy of the original [signature and date].

#### Who can certify copies of documents:

- A legal practitioner who holds a current practicing certificate under a law in force in a State or Territory in Australia
- An officer of an Australian bank, building society or finance company branch or office located in a foreign Jurisdiction with 2 or more years of continuous service (includes or an employee of Westpac New Zealand Limited with 2 or more years of continuous service)
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Employee of the Australian Trade and Investment Commission who is:
  - in a country or place outside of Australia; and
  - authorised under paragraph 3(d) of the Consular Fees Act 1955; and
  - exercising his or her function at that place
- Employee of the Commonwealth who is:
  - in a country or place outside Australia; and
  - authorised under paragraph 3(c) of the Consular Fees Act 1955; and
  - exercising his or her function in that place
- Judge of a court
- Magistrate
- Registrar, or Deputy Registrar, of a court
- A person authorised as a notary public in a foreign Jurisdiction
- Accountant who is:
  - a fellow of the National Tax Accountants' Association; or
  - a member of any of the following:
    - Chartered Accountants Australia and New Zealand;
    - the Association of Taxation and Management Accountants;
    - CPA Australia;
    - the Institute of Public Accountants
- A person who is authorised by law in the relevant Jurisdiction to administer oaths or affirmations or to authenticate documents.



## Panorama Super transfer to a KiwiSaver scheme

### Witnessing the Statutory declaration

BT will only accept the following witnesses

- Justice of the Peace (you can find a list in the New Zealand Yellow Pages),
- Commissioner of Declarations or Commissioner of Oaths in Australia,
- Notary public in New Zealand or Australia,
- Judge of a court or magistrate in an overseas jurisdiction,
- An enrolled barrister and solicitor of a High Court in New Zealand,
- Police officer in New Zealand,
- Australian consular officer or an Australian diplomatic officer.

### Where do I send the form?

You can send your completed and signed form with your certified proof of identity documents to your transferring fund. The form can be sent to BT Panorama, GPO Box 2861, Adelaide SA 5001.

### More information

For more information about super, visit the:

- Australian Securities and Investments Commission website at [www.moneysmart.gov.au](http://www.moneysmart.gov.au)
- ATO website at [www.ato.gov.au/super](http://www.ato.gov.au/super)

### Checklist

The below information must be confirmed by ticking the boxes below and supplying the required supporting documents before we can proceed with the payment:

I have sold down all of my investments

I have moved back to New Zealand permanently

My KiwiSaver scheme will accept the transfer of my Panorama Super account benefit

I have provided the necessary documentation as per the 'Completing proof of identity' section

I wish to close and transfer my entire benefit in my Panorama Super account to my KiwiSaver scheme

I have completed and attached the following:

Commonwealth of Australia Statutory declaration in section 4 of this form which states that I have migrated permanently to New Zealand and has been witnessed by a person who is authorised to do so.

Please note that as you are residing overseas, BT will only accept the following witnesses on a Commonwealth of Australia Statutory Declaration:

- An Australian Consular Officer;
- An Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1995); OR
- A person listed as an authorised witness and who holds a current Australian qualification, licence or registration (eg Australian doctor or lawyer working overseas). A copy of the person's credentials must be supplied.

One piece of evidence (eg utility bill, bank statement), not more than 12 months old, showing proof of my residence at a New Zealand address following my emigration to New Zealand.

Acceptable proof of New Zealand residency documents are:

- New Zealand utility bill issued within the past 12 months
- New Zealand government document issued within the past 12 months
- Bank Statement issued within the past 12 months

