



Take your super with you!

# Transferring your super to a KiwiSaver

If you're planning to move permanently to New Zealand, you may be able to transfer your Australian super to a KiwiSaver scheme under the Trans-Tasman retirement savings portability scheme. This scheme lets workers, who move between the two countries, combine their accounts to avoid doubling up on super fees.

## What are the rules?

We'll pay your super into a nominated KiwiSaver scheme providing you have:

- permanently moved to New Zealand
- opened an account with a KiwiSaver scheme that will accept the transfer

You'll need a New Zealand IRD number from Inland Revenue to transfer your retirement savings to a KiwiSaver scheme.

## When can I transfer my money?

You can transfer your super as soon as you've received permanent residency status in New Zealand, as long as you meet the other transfer rules.

## How do I ask for a transfer?

Complete the *Transfer from CareSuper to a KiwiSaver scheme* form available at [caresuper.com.au/forms](https://caresuper.com.au/forms).

You need to provide details of your KiwiSaver scheme account, including your member number, and proof that your KiwiSaver can accept the transfer.



Check if your KiwiSaver scheme will charge fees to accept the funds on your behalf.

## How much can I transfer?

There's no limit to how much you can transfer to a KiwiSaver scheme, however you must transfer your whole account balance.

Once you've withdrawn your balance, we'll close your account and any insurance you hold will cease.

## Will I pay tax on my transfer?

You won't pay any tax on the super you transfer from us into a KiwiSaver scheme.

## What paperwork do I need?

### To prove you've moved ...

To prove that you've permanently moved to New Zealand, you must complete and sign the statutory declaration provided in the *Transfer from CareSuper to a KiwiSaver scheme* form.

Your New Zealand statutory declaration will need to be witnessed by an authorised witness in New Zealand. For more information on New Zealand statutory declarations, visit [govt.nz/browse/law-crime-and-justice/making-a-statutory-declaration](http://govt.nz/browse/law-crime-and-justice/making-a-statutory-declaration).

Alternatively, you can provide an Australian statutory declaration form which is available at [ag.gov.au](http://ag.gov.au). This must be witnessed by an Australian consular officer or an Australian diplomatic officer within the meaning of the *Consular Fees Act 1955*.

### To prove who you are and where you live ...

You need to provide certified copies of:

- proof of where you live in New Zealand – for example, utilities bills, government letters and photo ID
- proof of your identity

## How to certify your documents



### 1. Copy your documents

Photocopy your documents. Make sure you copy both sides if the document is double-sided.



### 2. Have an authorised person sign them

Take the photocopy and your original documents to an authorised person and ask them to certify them. See *Who can certify your documents?* for a list of authorised people.



### 3. Send us the certified copies (not the originals)

**Email** [info@caresuper.com.au](mailto:info@caresuper.com.au)

**Post** CareSuper, GPO Box 1547, Hobart TAS 7001

### To certify your documents, the authorised person must:

Compare the photocopy to the original then stamp or write either **'This is a true and correct copy of the original'** or **'Certified true copy'** followed by their:

- signature
- full name
- qualification or position
- date of signing



## Who can certify your documents?

### Examples of people authorised to certify your documents in New Zealand:

- a Justice of the Peace
  - an employee of the police who holds the office of constable
  - notary public
  - registered medical doctor
  - registered teacher
  - minister of religion
  - lawyer
  - chartered accountant
  - Kaumātua
  - New Zealand Honorary consul
  - Member of Parliament
- In addition, they mustn't be:
- related to you
  - your spouse or partner
  - a person who lives at the same address as you



**Note** - people authorised to certify documents may differ to those authorised to witness your statutory declaration.

### What happens next?

We'll transfer your super in Australian dollars to your KiwiSaver scheme within 30 days.

### When can I access my super?

Please note that Australian retirement savings transferred to a KiwiSaver scheme:

- can't be used to purchase your first home
- can't be moved to a third country

Australian retirement savings transferred to New Zealand are held in your KiwiSaver scheme in two parts:

- the Australian-sourced component
- the New Zealand-sourced component

To access the Australian-sourced component, generally you'll need to be 60 or older and satisfy the Australian definition of retirement.

To access the New Zealand-sourced component, you'll need to reach the New Zealand age of retirement (currently 65 years old).

 All our forms and publications are available at [caresuper.com.au/forms-publications](https://caresuper.com.au/forms-publications) or call us, and we'll send you a copy.

### Here to help

**1800 005 166** (+61 3 7042 2723 if overseas)  
**caresuper.com.au**

 [info@caresuper.com.au](mailto:info@caresuper.com.au)  GPO Box 1547 Hobart TAS 7001



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# Transfer from CareSuper to a KiwiSaver scheme

1800 005 166  
[info@caresuper.com.au](mailto:info@caresuper.com.au)  
GPO Box 1547, Hobart TAS 7001

## Important information

Complete this form if you've permanently moved to New Zealand and you want to transfer your CareSuper account to your KiwiSaver. For more information refer to our *Transferring your super to a KiwiSaver* fact sheet available at [caresuper.com.au/forms-publications](https://caresuper.com.au/forms-publications).

### Things you should know:

- Your insurance will cease if you close your account.
- If you want to claim a tax deduction or split your contributions, do this before submitting this form. These options aren't available for contributions you've withdrawn from CareSuper.
- You should seek personal advice to confirm if this payment will have tax or social security implications.

If you have more than one CareSuper account, complete a separate form for each account.

## Section 1

### Current personal details

Member number

Account number

Date of birth (DD MM YYYY)

Place of birth

Last name

Given name(s)

Current New Zealand residential address

Suburb/Town/City

NEW ZEALAND

Postcode

Preferred phone

Email

New Zealand IRD Number





