



Milford KiwiSaver Plan Subsequent Retirement Withdrawal Form

Complete this form if you have previously made a Retirement Withdrawal from your Milford KiwiSaver Plan account.

The easiest way to request a withdrawal is online, either via the Client Portal or Mobile App.

Once complete please return this form to:

Email: transactions@milfordasset.com

Post: Milford KiwiSaver Plan, PO Box 960, Shortland Street, Auckland 1140

Member Details

TITLE	FIRST NAME	MIDDLE NAME(S)	SURNAME
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ACCOUNT NUMBER	IRD NUMBER	DATE OF BIRTH	
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	
EMAIL ADDRESS	CONTACT PHONE NUMBER		
<input type="text"/>	<input type="text"/>		

Privacy Statement

By completing this form, you acknowledge and accept that Milford Asset Management Limited and any of its related or controlled entities may (i) collect, hold, use, and disclose the personal information you provide (now and in the future) for the purposes outlined in our Privacy Policy available at milfordasset.com/privacy-policy, and (ii) contact you (via any method) about this form or to offer our financial opportunities, products or services (with the option to unsubscribe from marketing communications at any time).

For any queries related to this Privacy Statement or to access or update your information, please email: info@milfordasset.com or call 0800 662 346.

Milford KiwiSaver Plan

Subsequent Retirement Withdrawal Form (continued)

Withdrawal Details

Members can make a full or partial withdrawal with the following options:

Option 1: Paid to your bank account

Option 2: Paid to an existing Milford Investment Funds account or Milford Wealth Management account

Please fill in the relevant sections below.

Option 1: Withdrawal Payment to your Bank Account

Select the type of withdrawal you would like to make from the three options below:

PARTIAL WITHDRAWAL AMOUNT

I wish to make a lump sum withdrawal from my KiwiSaver account of

A minimum balance of \$1,000 is required for your KiwiSaver account to remain open.

Fund to withdraw from:

If you have multiple KiwiSaver Funds, your withdrawal will be deducted proportionately from each fund. To withdraw from a specific fund(s), please detail the fund name(s) and dollar amount(s) below:

REGULAR WITHDRAWAL AMOUNT START DATE*

I wish to set up a regular withdrawal of

FREQUENCY

Weekly Fortnightly Monthly Quarterly 6-Monthly Annually

* Allow five business days from our receipt of this form for set up. Note this date is when we will start the withdrawal process, payment can take up to three business days to reach your bank account. Payments are only processed on business days. Withdrawals falling on non-business days will be processed on the next business day.

Fund to withdraw from:

If you have multiple KiwiSaver Funds, your regular withdrawal will be deducted proportionately from each fund. To withdraw from a specific fund(s), please detail the fund name(s) and dollar amount(s) below:

FULL WITHDRAWAL

I wish to make a full withdrawal and close my KiwiSaver account. Please note a full KiwiSaver withdrawal can take up to 10 working days to process.

BANK ACCOUNT DETAILS:

Please pay the withdrawal into my nominated bank account held on file.

If you have not previously provided your bank account details, including proof of the bank account, or your bank account has changed, please complete the section below and provide proof of your bank account (refer below) along with this form.

BANK ACCOUNT NAME	BANK ACCOUNT NUMBER
<input style="width: 100%;" type="text"/>	<input style="width: 20px; height: 20px;" type="text"/>
	BANK BRANCH ACCOUNT NUMBER SUFFIX

If needed, please provide **proof of your bank account** such as a bank statement, bank letter or mobile banking screenshot that:

- Was issued in the last 12 months
- Includes bank account name
- Includes bank account number
- Includes bank logo

Milford KiwiSaver Plan

Subsequent Retirement Withdrawal Form (continued)

Withdrawal Details (continued)

Option 2: Withdrawal Payment to your other Milford Account

Please complete the details for the account you would like the KiwiSaver withdrawal payment to be made to:

INVESTMENT FUNDS ACCOUNT

I wish to withdraw some/all of my KiwiSaver investment and transfer it to my existing Milford Investment Funds account*

Amount to transfer from your KiwiSaver account: \$ or Full KiwiSaver balance and close account

For partial transfers, if you have multiple KiwiSaver funds, this will be deducted proportionately from each fund.

To withdraw from a specific fund(s), please detail the KiwiSaver fund name(s) and dollar amount(s) below:

Pay to my Investment Funds account and existing Fund(s) as detailed below:

MILFORD ACCOUNT NAME (e.g. A B Smith)

ACCOUNT NUMBER

M	L								
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Investment Funds Allocation:

INVESTMENT FUND NAME	AMOUNT	OR	ALLOCATION
	\$ <input style="width: 100px;" type="text"/>	OR	<input style="width: 100px;" type="text"/> %
	\$ <input style="width: 100px;" type="text"/>	OR	<input style="width: 100px;" type="text"/> %
	\$ <input style="width: 100px;" type="text"/>	OR	<input style="width: 100px;" type="text"/> %
	\$ <input style="width: 100px;" type="text"/>	OR	<input style="width: 100px;" type="text"/> %

Ensure you complete only one of the above columns (\$ or %) as applicable.

* If you are opening an Investment Funds account or are wanting to establish a new Fund holding within your existing Investment Funds account, you will need to complete an application form before completing this withdrawal form. The easiest way to apply is via the Portal or Mobile App. Alternatively to obtain an Investment Funds account application form please contact Milford on 0800 662 345, or visit our website www.milfordasset.com.

WEALTH MANAGEMENT ACCOUNT

I wish to withdraw some/all of my KiwiSaver investment and transfer it to my Milford Wealth Management account

Amount to transfer from your KiwiSaver account: \$ or Full KiwiSaver balance and close account

For partial transfers, if you have multiple KiwiSaver funds, this will be deducted proportionately from each fund.

To withdraw from a specific fund(s), please detail the KiwiSaver fund name(s) and dollar amount(s) below:

Pay to my Wealth Management account as detailed below:

ACCOUNT NAME

ACCOUNT NUMBER

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Payment will be made direct to the Custodians on your behalf, the details of which are:

Account Name: Investment Custodial Services Limited

Account Number: 12-3113-0001150-02

Please speak directly to your Milford Wealth Management Financial Adviser if you have any queries relating to the subsequent investment of funds into your portfolio.

Milford KiwiSaver Plan Subsequent Retirement Withdrawal Form (continued)

Authorisation

I understand that:

- Once the correct documentation is received, a full withdrawal is usually processed and paid to my bank account, or transferred to my other Milford account, within 10-15 business days of receiving my request. Partial withdrawals can take up to three business days to process.
- In certain circumstances, such as a large withdrawal, Milford may need to contact me to verbally verify my request before it can be processed.
- It is not possible to time my withdrawal request for a specific unit price. The unit price received for my withdrawal request will be the unit price that is available on the business day that my withdrawal request is processed.

I acknowledge and agree to the terms of the Privacy Statement on page 1.

SIGNATURE OF MEMBER

DATE

RETURNING YOUR COMPLETED FORM

Once complete please return this form and any supplementary documentation to:

Email: transactions@milfordasset.com

Post: Milford KiwiSaver Plan, PO Box 960, Shortland Street, Auckland 1140

If you require assistance with this form, please contact Investor Services on 0800 662 346.