



## Milford KiwiSaver Plan Subsequent Retirement Withdrawal Form

Please complete this form if you have reached your KiwiSaver age of eligibility and have previously withdrawn funds from your Milford KiwiSaver Plan account.

Once complete, please return this form to: **Milford KiwiSaver Plan, PO Box 960, Shortland Street, Auckland 1140** or via email to **transactions@milfordasset.com**.

### Member Details

|                      |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| TITLE                | FIRST NAME(S)        | MIDDLE NAME(S)       | SURNAME              |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

|   |   |  |
|---|---|--|
| INVESTOR NUMBER   | IRD NUMBER  | DATE OF BIRTH  |
| <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> / <input type="text"/> / <input type="text"/> |

|                      |                      |
|----------------------|----------------------|
| EMAIL                | CONTACT PHONE NUMBER |
| <input type="text"/> | <input type="text"/> |

|                                       |                      |
|---------------------------------------|----------------------|
| PHYSICAL ADDRESS (cannot be a PO Box) | SUBURB               |
| <input type="text"/>                  | <input type="text"/> |

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| CITY                 | COUNTRY              | POSTCODE             |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

|   |                      |
|---|----------------------|
| POSTAL ADDRESS (if different from physical address) | SUBURB               |
| <input type="text"/>                                | <input type="text"/> |

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| CITY                 | COUNTRY              | POSTCODE             |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

### Withdrawal Information

|                         |
|-------------------------|
| AMOUNT TO WITHDRAW      |
| \$ <input type="text"/> |

|   |
|---|
| FREQUENCY   |
| <input type="checkbox"/> Single <b>OR</b> <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly |

|  |
|--|
| START DATE   |
| <input type="text"/> / <input type="text"/> / <input type="text"/> |

# Milford KiwiSaver Plan

## Subsequent Retirement Withdrawal Form (continued)

Or transfer to a Milford Investment Fund account:

MILFORD INVESTMENT FUNDS ACCOUNT NUMBER

|   |   |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|
| M | L |  |  |  |  |  |  |
|---|---|--|--|--|--|--|--|

|                                    |    |   |    |
|------------------------------------|----|---|----|
| Milford Trans-Tasman Bond Fund     | \$ | Milford Australian Absolute Growth Fund | \$ |
| Milford Global Corporate Bond Fund | \$ | Milford Active Growth Fund              | \$ |
| Milford Conservative Fund          | \$ | Milford Global Equity Fund              | \$ |
| Milford Diversified Income Fund    | \$ | Milford Trans-Tasman Equity Fund        | \$ |
| Milford Balanced Fund              | \$ | Milford Aggressive Fund                 | \$ |
| Milford Cash Fund                  | \$ |   |    |

If you are opening a new Investment Fund account or are wanting to establish a new Fund holding within your existing Investment Fund account, you will need to complete an application form and send it to us with this withdrawal form. To obtain an application form please contact Milford toll free **0800 662 345**, or visit our **website [www.milfordasset.com/investing/pie-funds](http://www.milfordasset.com/investing/pie-funds)**.

### Payment Details

Please note Milford will only make payments in New Zealand dollars to a New Zealand domiciled bank account in your name. **Please provide us with a copy of the bank statement or bank generated deposit slip for the account you are nominating for payment.**

NAME OF BANK ACCOUNT

NAME OF BANK

BRANCH

ACCOUNT NUMBER

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|

BANK

BRANCH

ACCOUNT NUMBER

SUFFIX

### Authorisation

SIGNATURE OF MEMBER

DATE