

Australian Superannuation Transfer Process



Step 1

If you are not already a member of the NZ Funds KiwiSaver Scheme, please complete the process to become a member of the NZ Funds KiwiSaver Scheme by contacting an authorised financial adviser at ISN, phone 0800 66 66 78.

If you are NZ Funds KiwiSaver Scheme member, complete the Authority to Transfer Australian Superannuation form and send it to ISN, PO Box 834, Whangarei 0140.

Step 3

On receipt of the Authority to Transfer Australian Superannuation form, your Australian Provider(s) will inform us of the documentation required to complete the transfer.

This may include (but is not limited to) a certified copy of your Passport and/or Driver's Licence, Birth Certificate. They may also require a Statutory Declaration regarding your permanent emigration or return to New Zealand

Please note that requirements may vary between Australian Providers.

Step 5

When the documentation is accepted, your Australian Provider(s) will proceed with the transfer. They will either forward a cheque payable to the NZ Funds KiwiSaver Scheme or transfer funds electronically to the NZ Funds KiwiSaver Scheme.

Upon receipt of the funds, the NZ Funds KiwiSaver Scheme will allocate the funds to your NZ Funds KiwiSaver account according to your chosen portfolio allocation.

Step 2

Once received, we will send the Authority to Transfer Australian Superannuation form to the provider detailed on the form, with an accompanying letter requesting their documentation requirements in order to action your transfer.

If you have more than one Australian Superannuation Provider please complete individual forms for each provider.

Step 4

When documentation requirements are received, we will contact you to discuss the requirements. Rest assured we are here to assist you with this which will make the process stress-free.

When completed, we will forward the relevant documentation to your Australian Provider(s).

Step 6

The NZ Funds KiwiSaver Scheme will confirm the funds have been received and allocated to your KiwiSaver account and generate a 'Transfer Confirmation' letter which will be sent to you, notifying you the transfer has been received, and the corresponding \$NZ value applied to your KiwiSaver account.

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