

Transferring unlocked retirement savings to your locked account

Use this form if you want to move retirement savings within your mysuper account from your unlocked account to your locked account.

Important Information

Clause 5j of the mysuper trust deed allows you to transfer retirement savings from your unlocked account to your locked account.¹ There are some important rules around changing your unlocked retirement savings to locked:

- You can only transfer your retirement savings in your unlocked account if you already have a locked account. If you don't have a locked account and would like to set one up, please complete the 'Change your account structure' form at mysuper.co.nz/make-account-changes/change-your-account-structure
- Once you have made a transfer of your retirement savings from your unlocked account to your locked account it cannot, under any circumstance, be reversed or changed, including if you change your mind. Your transferred money will become subject to the KiwiSaver Rules as provided by schedule 1 of the KiwiSaver Act 2006.

☐ I understand that, except in limited circumstances, I won't be able to access my retirement savings in my locked account until I reach retirement age (currently 65) or, if I am over 60 when I first opened my locked account or joined a KiwiSaver scheme for the first time, I won't be able to access my retirement savings in my locked account for five years from the date that I opened/joined.

☐ I confirm that I have read and understood all of the important information provided above, relating to the transfer of my unlocked retirement savings to my locked account. Also, I accept and understand my transferred money will become subject to the KiwiSaver Rules as provided by schedule 1 of the KiwiSaver Act 2006 and the associated conditions that apply, in particular once the transfer is completed it cannot, under any circumstance, be reversed or changed.

Member's Personal Details

Member Number:

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First Name(s):

Last Name:

Personal Email:

Mobile:

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¹ Note: The mysuper trust deed does not, under any circumstances, allow a member to transfer their retirement savings from their locked account in to their unlocked account. This restriction is provided by the KiwiSaver Act 2006.

Transfer Details

- ☐ I wish to transfer all my retirement savings in my unlocked account to my locked account; or
- ☐ I wish to transfer \$_____ of my retirement savings in my unlocked account to my locked account; and
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- ☐ I confirm that I am making an informed decision, and completely understand the impacts of transferring retirement savings in my unlocked account to my locked account; and
- ☐ I confirm that once I have made a transfer of retirement savings from my unlocked account to my locked account it cannot be reversed or changed for any reason, including if I change my mind.
- ☐ I understand that, except in limited circumstances, I won't be able to access my money in my locked account until I reach retirement age (currently 65) or, if I am over 60 when I first opened my locked account or joined a KiwiSaver scheme for the first time, I won't be able to access my retirement savings in my locked account for five years from the date that I opened/joined.
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Declaration

- ☐ I, _____ confirm that I have read and understood all of the information provided above relating to Transferring unlocked retirement savings to my locked account, and accept the conditions that apply in the current **mysuper** Product Disclosure Statement PDF and other material information.

Signature: _____

Date:

D	D
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M	M
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Y	Y	Y	Y
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Please return the completed form by email to hello@mysuper.co.nz or by posting to:
Fund Administrator, **mysuper**, PO Box 1849, Wellington 6140.