

Section 4: Privacy

This form collects personal information about you. The information collected will be used to enable the Trustee to make a decision regarding your first home or second chance home withdrawal. Funds Administration New Zealand Limited ("FANZ") also has access to this information. This information will be held by FANZ and/or the Trustee at their address set out in the current investment statement for the Lifestages KiwiSaver Scheme. Under the Privacy Act 1993, you have the right to access and to request correction of any personal information about you held by FANZ and/or the Trustee. The information will only be disclosed to another party to the extent necessary for the purpose set out above, where required by law, or as otherwise authorised by you.

Section 5: Statutory Declaration

I (Full Name)

Of (Address)

Occupation

solemnly and sincerely declare and agree that:

1. Except where this application relates to a second chance home withdrawal and a confirmation from Housing New Zealand that I qualify is attached, I have not previously held an estate in land (whether alone or as a joint tenant or a tenant in common) or that any previous estate was or is held on the basis described in Rule 8(5) of the KiwiSaver Rules.
2. I have never made a withdrawal from a KiwiSaver scheme (whether this scheme or any scheme to which I previously belonged) for a first home withdrawal or second chance home withdrawal before.
3. I have been a member of a KiwiSaver scheme for three years or more.
4. I confirm the property I am purchasing is intended to be my principal place of residence.
5. I understand that should the information given be incomplete or incorrect the Trustee will not be able to complete its assessment of my application without receiving the complete and correct information.
6. I understand that my application for a first home withdrawal or second chance home withdrawal is subject to the Trustee receiving (in a form acceptable to the Trustee):
 - a. pre-printed deposit slip for my solicitor's trust account; and
 - b. certificate from my solicitor enclosing a copy of the sale and purchase agreement, which clearly shows me as the purchaser and contains an undertaking relating to the unconditional nature of the agreement and the application of funds withdrawn; and
7. I understand that my withdrawal value will be based upon the unit price(s) at the date my request is processed and will be paid to my solicitor's trust account.

AND I MAKE THIS SOLEMN DECLARATION

conscientiously believing the same to be true and under and by virtue of the provisions of the Oaths and Declarations Act 1957.

Member's Signature

DECLARED at this day of 20

Before me:

Justice of the Peace / Solicitor of the High Court of New Zealand
/ Other person authorised to take statutory declarations

Section 6: Check List

Before returning this application, please ensure that:

1. You have answered all questions in the first home withdrawal and second chance home withdrawal pre-approval application form and signed the declaration.
2. If you are applying for a second chance home withdrawal, you have attached confirmation from Housing New Zealand that you qualify.
3. You are fully aware of the requirements you must meet in order to qualify for this withdrawal and that any pre-approval the Trustee's processes is subject to.
4. You have attached a pre-printed deposit slip for your solicitor's trust account and your solicitor's certificate and undertaking (unless these have been provided to the Trustee separately by your solicitor).

To: Trustees Executors Limited as trustee of the Lifestages KiwiSaver Scheme ("Scheme")

Re: [Member's name] ("Member")

We refer to the Member's application for a home purchase withdrawal from the Scheme ("Application"), which relates to the purchase of [insert details of property] ("Property").

The settlement date for the purchase of the Property is [insert date].

Documents

We enclose copies of the following:

1. the agreement for sale and purchase of the Property with [insert name] ("Vendor") dated [insert date] ("Agreement"); and
2. our pre-printed bank deposit slip.

We confirm that we act for the Member, who is to purchase the Property under the Agreement.

Undertaking

We undertake to you that:

1. as at the date of this letter any conditions to the Agreement have been fulfilled or waived and the Vendor and the purchaser(s) are unconditionally obliged to settle; and
2. any funds received by us pursuant to the Application ("Funds") will be paid to or as instructed by the Vendor as part of the purchase price; or
3. if settlement under the Agreement is not completed by the due date in the Agreement or any extended date, the Funds will be repaid to you as soon as practicable on account of the Member with no deductions or disbursements.

I confirm that I hold a current Practising Certificate issued pursuant to the Lawyers and Conveyancers Act 2006.

DATED:

Name of Legal Firm:

Signature of Partner/Director in Firm:

Name of Partner/Director in Firm: