

Withdrawal Form

SIGNIFICANT FINANCIAL HARDSHIP

Your details

Title Given name(s) (please print) Surname

Postal address

Street number and name Suburb

Town/City Postcode Country

IRD no. Fisher Funds KiwiSaver Member Number

Home phone Business phone Mobile phone

Significant financial hardship withdrawal request

According to the KiwiSaver Act, 'significant financial hardship' is defined as including significant financial difficulties that arise because of:

- A member's inability to meet minimum living expenses; or
- A member's inability to meet mortgage repayments on his or her principal family residence resulting in the mortgagee seeking to enforce the mortgage on the residence; or
- The cost of modifying a residence to meet special needs arising from a disability of a member or a member's dependant; or
- The cost of medical treatment for an illness or injury of a member or a member's dependant; or
- The cost of palliative care for a member or a member's dependant; or
- The cost of a funeral for a member's dependant; or
- The member suffering from a serious illness.

Payment details

Amount requested for withdrawal* \$

(Please attach supporting documents)

* This may be an amount up to the value of your KiwiSaver account, less the \$1,000 Kickstart Contribution Amount and all Member Tax Credit Amounts – please call us on 0800 FFKIWI (0800 335 494) if you are unsure what these amounts are.

Bank account details

Insert your New Zealand bank account details here

Note: Fisher Funds will only make payments in New Zealand dollars to a New Zealand bank account.

Name of bank account

Bank Branch number Account number Suffix

Statutory declaration

I do solemnly and sincerely declare that:

1. I am a member of the Fisher Funds Growth KiwiSaver Scheme
2. I am experiencing significant financial hardship, and
3. I am applying to the Trustee for a significant financial hardship withdrawal
4. I need this money because:**

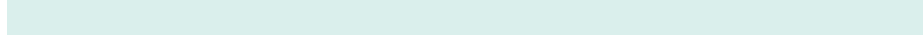
** You should be aware that the Trustee (if it grants your withdrawal request) may limit the amount that you may withdraw to an amount that, in its opinion, is required to alleviate your financial hardship.

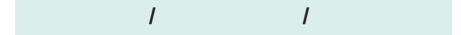
5. Details of my assets and liabilities have been accurately completed on the attached sheet (if you require more space continue on an additional sheet)
6. I have explored and exhausted all reasonable alternative sources of funding, including by way of borrowing.
7. The payment is not being re-invested but is to be used to alleviate the financial situation I am currently experiencing

I make this solemn declaration conscientiously believing the same to be true, and by virtue of the Oaths and Declarations Act 1957.

Signature of member

Date



 / /

I certify that I have read the notes and that all information I have supplied is correct.

Before me



A justice of the peace, or solicitor, or notary public, or other person authorised to take a statutory declaration.

Send your completed form to Fisher Funds, c/o Trustees Executors, PO Box 409, Wellington, 6140

Financial statement

Name Date of birth / /

Your current financial details

Assets	\$ <input type="text"/>	Liabilities	
Bank accounts (total) investments/cash deposits	<input type="text"/>	Home loans	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Type <input type="text"/>	Amount <input type="text"/>	Lender <input type="text"/>	Amount <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Type <input type="text"/>	Amount <input type="text"/>	Lender <input type="text"/>	Amount <input type="text"/>
Life insurance(s)	<input type="text"/>	Hire purchase	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Company <input type="text"/>	Surrender value <input type="text"/>	Company <input type="text"/>	Amount <input type="text"/>
Real estate/property	<input type="text"/>	Personal/car loans	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Address <input type="text"/>	<input type="text"/>	Lender <input type="text"/>	Amount <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Address <input type="text"/>	Market value <input type="text"/>	Lender <input type="text"/>	Amount <input type="text"/>
Real estate/property	<input type="text"/>	Credit cards/store cards	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Address <input type="text"/>	<input type="text"/>	Limit <input type="text"/>	Amount owing <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>
Address <input type="text"/>	Market value <input type="text"/>	Lender <input type="text"/>	<input type="text"/>
Motor vehicle	<input type="text"/>	Other liabilities (please specify)	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Make/model <input type="text"/>	Current value <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
Make/model <input type="text"/>	Current value <input type="text"/>		
Other (shares etc)	<input type="text"/>		
<input type="text"/>	\$ <input type="text"/>		

Your current income and expenses

Monthly income	\$ <input type="text"/>	Loan/credit monthly commitments	
Other income	<input type="text"/>	Home loan	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	Hire purchase	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	Personal/car loans	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	Credit/store cards	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	Child support payments	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>	Other monthly commitments	
<input type="text"/>	\$ <input type="text"/>	Insurance (car, house, life etc)	\$ <input type="text"/>
		Superannuation	\$ <input type="text"/>
		Other income	\$ <input type="text"/>
		Rates/rent	\$ <input type="text"/>
		Electricity/gas/telephone	\$ <input type="text"/>
		Food/groceries	\$ <input type="text"/>
		Clothing/footwear	\$ <input type="text"/>
		Transport costs	\$ <input type="text"/>
		House costs	\$ <input type="text"/>
Gross monthly income (before tax)	\$ <input type="text"/>	Student loan	\$ <input type="text"/>
		Other regular expenses	\$ <input type="text"/>
Net monthly income (after tax)	\$ <input type="text"/>	Total monthly expenses	\$ <input type="text"/>