

Withdrawal Form

SERIOUS ILLNESS

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

Serious illness withdrawal request

Amount requested for withdrawal \$

* (This may be an amount up to the value of your KiwiSaver account – please call us on 0800 FFKIWI (0800 335 494) if you are unsure what this amount is).

As per the KiwiSaver Act we require the following proof that you are suffering a serious illness:

- Proof of permanent and total disablement or serious and imminent risk of death (certified medical report/certificate).

Payment details

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 suffering a serious illness
3. I am applying to the Trustee to withdraw my balance from the Fisher Funds Growth KiwiSaver Scheme
4. Details of my assets and liabilities have been accurately completed on the attached sheet.
5. I have lived in New Zealand since opening my KiwiSaver account, or (if otherwise) I have detailed below the periods for which I had my principal place of residence in New Zealand since opening my KiwiSaver account:

If you have lived overseas since opening your KiwiSaver account, please tell us the periods for which you had your principal place of residence in New Zealand since opening your KiwiSaver account:

Please note that the Trustee may request more information.

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

/ /

Before me

Date

/ /

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

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

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"/>	Lender <input type="text"/>	<input type="text"/>
Address <input type="text"/>	Market value <input type="text"/>	Other liabilities (please specify)	<input type="text"/>
Motor vehicle	<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"/>	<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 loans	\$ <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"/>