

Leaving Form

Please print in black or blue pen, in uppercase, one character per box and all that apply.

Fill in this form when you leave the company so we know what you would like us to do with your savings in the Plan. Return it to Payroll so they can complete their section.

They will then send it to Mercer to process. Unless you're leaving your money in the Plan, you need to include a bank statement or a pre-printed bank-encoded deposit slip.

If you need assistance completing this form, please feel free to contact our toll-free Helpline on **0508 637 237**.



Privacy statement

Information in this form and any requested documents are being collected to enable administration of this account. The Privacy Act entitles the account holder to access and to request correction of any personal information.

Step 1 – Complete your personal details

Membership number

IRD number

Title: Mr Mrs Ms Miss Other

Date of birth / /

First name

Middle name(s)

Surname

Residential address

Number	Street Name
Suburb	
City	Postcode
Country	

Mailing address (if different from residential address)

Number	Street Name
Suburb	
City	Postcode
Country	

Telephone

Mobile

Home phone

Email

Step 2 – Withdrawal details

Option 1 – I would like to defer payment of my full benefit and leave my money invested in the Plan as a deferred member. Please proceed to Step 3.

Option 2 – I wish to withdraw \$ from my account and retain the rest of my account balance invested in the Plan as a deferred member.

Option 3 – I wish to withdraw the full amount of my account balance and close my account.

AND

By choosing option 2 or 3, I confirm that I have provided a pre-printed bank encoded deposit slip or printed bank statement. (Payments can be made to a New Zealand bank account in your name. Payments will not be made to business accounts, family trust accounts or accounts of another person.)

Step 3 – Certified Identity Documents

Your withdrawal request must be submitted with one of the identification options set out below. We may have your identification documents on file, please contact us to confirm this. We may need to request new identification documents from you.

Option 1 – Electronic identity verification

Mercer as the Manager has the ability to electronically verify your identity. Once we have received your withdrawal request we will send you an SMS via our third party partner to biometrically verify your identity. To complete this method of verification you must have: a smartphone (with a front camera that is capable of taking a photo/video) and a current (not expired) version of one of the following:

New Zealand Passport

OR

New Zealand Drivers Licence

If this method of identification is unsuccessful you will be required to provide certified ID.

Option 2 – Certified copies of identity documents and confirming your residential address

Please provide a certified copy of your identity documents. Refer below for information on acceptable identity documents and who can certify them. You will also need to provide us with copies of documents confirming your residential address, please refer below.

Preferred identification method – please select one of the following options:

- Option 1 – I would like the Manager to electronically verify my identity
- Option 2 – I would like to provide the Manager with certified copies of my identity documents

If you have selected Option 1 you do not need to provide certified ID now.

Provide a certified photocopy of current and valid documents.

If you selected Option 2 as your preferred way for us to verify your identity, please select one of the certified identification options below. We are only able to accept original certified copies of certified ID (i.e. the copy that has been physically certified).

These documents must be posted to us - our postal address is Mercer (N.Z.) Limited, PO Box 1849, Wellington 6140, New Zealand.

If your name has changed please provide evidence of your name change which links your previous and current names.

Mercer members who are supplying overseas identity documents must also provide proof of New Zealand residency.

A A certified photocopy of ONE of:

- A New Zealand or an overseas passport; or
- A New Zealand firearms licence; or
- A New Zealand Certificate of Identity*; or
- A New Zealand Refugee travel document; or
- An emergency travel document; or
- An overseas government national identity card (appropriate pages containing name, date of birth, photograph and signature)

B A certified photocopy of ONE of:

- A New Zealand or an overseas driver's licence; or
 - Kiwi Access Card (previously known as 18+ Card)
- PLUS**
- A certified photocopy of ONE of:**
- A New Zealand or an overseas birth certificate; or
 - A New Zealand or an overseas citizenship certificate

C A certified photocopy of ONE of:

- A New Zealand or an overseas driver's licence
- PLUS**
- A certified photocopy of ONE of:**
- A (Super) Gold Card; or
 - A Community services card; or
 - A bank account or a credit card statement issued by a New Zealand registered bank in the 12 months preceding the date of the application; or
 - A statement issued by Inland Revenue or another Government agency in the 12 months preceding the date of the application

* Please visit passports.govt.nz to read more about this ID document.
A Gold Card is NOT considered a type of a New Zealand Certificate of Identity.



How to have your ID correctly certified

Photocopy ID at 150% so the details are legible.
Please do not send in your physical identity documents e.g. passport, driver's licence, birth certificate etc.

I certify this to be a true copy of the original document and confirm it represents the identity of Joe Smith.

Name: **Jane Doe**

Occupation: **Justice of the Peace**

Date: **18/04/2024**

Signature:

Please note: Certification is valid for three months and must have been carried out within three months of this application. Your identity documents must be certified by one of the following people: Justice of the Peace, Registered Lawyer, Chartered Accountant, Registered Teacher, Registered Doctor, Police Officer, Notary Public, Registrar/Deputy Registrar.

Confirming your residential address

You need to provide us with either **an original OR a non-certified photocopy of ONE** of:

- A bank statement issued by a registered bank; or
- A letter or statement issued by a Council (e.g. Rates or Valuation Notice); or
- A hire purchase agreement; or
- A statement issued by a government agency (e.g. Statement from Inland Revenue, Electoral Office, Car registration document); or
- A utility bill issued by a utility company (e.g. telephone company, electricity company or water provider); or
- An insurance policy document; or
- A rental tenancy agreement.

Your name must appear on the document and the document must be dated within the last 12 months prior to you submitting your application. A document sent to a PO Box number can't be accepted unless it also shows your physical residential address, for example a rates invoice will show the postal address and the physical address of the property.

Step 4 – Sign the form

Member's Signature

Date / /

Please return this form to payroll. Scan and email it to payroll@nzpost.co.nz or post it to Payroll, Employee Information Services, NZ Post, Private Bag 39990, Wellington Mail Centre, Lower Hutt 5045

Membership number

Office use only – payroll to complete

The member is entitled to a benefit because they are ceasing employment due to:

- Resignation (under 65)
- Retirement (over 65)
- Severance/redundancy
- Dismissal
- Medical retirement

Last day of employment / /

Final contribution made on / /

Contributions for the current financial year

Please advise the contributions for the current financial year from 1 April to the exit date.

Member contribution \$

Voluntary contribution \$

Employer contribution \$

Completed by:

Name

Signature


Date / /

Countersigned by:

Name

Signature

Date / /

 **Payroll please return this completed to:** Mercer (N.Z.) Limited, Freepost Authority Number 3629, PO Box 1849, Wellington 6140 or email the form to MSTNZAdmin@mercer.com.