



Westpac New Zealand Staff Superannuation Scheme In-Tandem Member Leaving Employment with Westpac

Advice to Mercer (N.Z.) Limited

If you need any help in completing this form, please phone us on **0508 INTANDEM (0508 468 263)**.

I hereby advise that I will be leaving employment with Westpac as at close of business on ____/____/____
(DAY / MONTH / YEAR)

I acknowledge that I have to make some decisions about my accumulated balance in In-Tandem and I would like to confirm what I wish to be done as indicated below.

Please tick the box to indicate your choice

- ☐ **To leave my money in In-Tandem** as a Continued Beneficiary, for up to two years while I decide what to do. (An application form for this option is located on the Scheme's website www.westpacnzstaffsuper.co.nz under Documents/Member forms).

If you choose this option, then a completed Continued Beneficiary application form must be included with this form.

- ☐ **To transfer my balance to my KiwiSaver account.**
My KiwiSaver details are:

KiwiSaver Provider

Membership Number

- ☐ **To transfer my balance to my Managed Fund.**
My Managed Fund details are:

Fund Provider

Membership Number

- ☐ **To transfer my balance to my bank account.**
My bank account is:

Bank

Branch

Bank Account Number

IMPORTANT: You must provide proof of your bank account e.g. a copy of a bank statement clearly showing your full name, account number and bank's logo.

I acknowledge that when I exit my employment with Westpac that my In-Tandem Life Insurance and Total & Permanent Disablement Insurance will cease.

- ☐ I wish to apply for the life insurance component to continue at my own cost but without any medical underwriting on the death benefit previously provided to me as a member of In-Tandem. I understand that I will need to submit my completed application for this cover within **60 days of my exit date** from the Bank. Fidelity Life can facilitate this application process. Please contact them on **0800 738 641**.

Your Details

Given name(s)

Surname

Salary Number

Phone Number (which you can be contacted on once you have left Westpac):

Email Address (which you can be contacted on once you have left Westpac):

Signature

Date ____/____/____
(DAY / MONTH / YEAR)

What next?

Now scan and email this form (and your Continued Beneficiary application form or proof of bank account – if applicable) to westpacstaffsuper@mercerc.com so that your choice can be completed.

PLEASE NOTE THAT MERCER (N.Z.) LIMITED IS UNABLE TO PROCESS YOUR PAYMENT UNTIL ALL FINAL DOCUMENTS AND PAYROLL CONTRIBUTIONS HAVE BEEN RECEIVED.

As a guide, payment is usually completed within 3 months after you leave Service, but can be delayed if information requested by Westpac or Mercer is not provided by you in a timely manner. Mercer will pay your benefit to the account used by Westpac for your remuneration, unless you provided verified alternative payment information using this form within one month of leaving Service, or as otherwise approved by the Scheme administrator on the Scheme's behalf.