

Evergreen Retirement Trust Windup – Member Checklist

Once you have completed this checklist, and gathered the required certified paperwork, please send this signed checklist and the paperwork to the address below using your preferred method of postage.

Registered Post – PO Box 317, Christchurch 8140, New Zealand

OR

Courier – Level 1, North Lobby, Awly Building, 293 Durham Street, Christchurch 8013, New Zealand

Please tick one of the two boxes, and sign below:

- I wish to have windup distributions paid to my nominated bank account
- I wish to have windup distributions transferred to another QROPS or UK Pension Scheme

Signature: _____ Date: _____

Request to have Distributions Paid to My Nominated Bank Account

(Please tick each box to show that you have enclosed the below documents)

<input type="checkbox"/> Certified proof of identification	<i>A certified copy of your valid passport. If the passport has expired, then we would need an additional proof of identification (driver's license). The certification can only be done by a Lawyer, Justice of Peace, or equivalent Notary</i>
<input type="checkbox"/> Certified proof of address	<i>A certified copy confirming your residential address. This can be a utility bill which should not be more than 3 months old. The certification can only be done by a Lawyer, Justice of Peace, or equivalent Notary</i>
<input type="checkbox"/> Certified proof of bank account	<i>A certified copy of a document confirming your bank account. This can be a bank statement or letter from your bank which should not be more than 3 months old. The certification can only be done by a Lawyer, Justice of Peace, or equivalent Notary</i>

Bank Details	
Account Name:	
Account Number:	
Name of Bank:	
Bank Address:	
IBAN Code:	
Swift/Sort Code:	

Request to Transfer the Distributions to another QROPS or UK Pension Scheme

<input type="checkbox"/> QROPS & UK Pension Scheme Transfer Form	Please download the QROPS & UK Pension Scheme Transfer Form from the Documents page on the ERT website http://evergreentrust.co.nz/ . The form has instruction on how to complete it and what you need to provide with the signed QROPS transfer request
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