

## Evergreen Retirement Trust Windup - Member Nomination

Once you have completed this nomination, and gathered the required certified paperwork, please send this signed form 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 (complete **Section 1** below)
- I wish to have windup distributions transferred to another QROPS or UK Pension Scheme (complete **Section 2** below)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### **Section 1: Request to have Distributions Paid to My Nominated Bank Account**

**IMPORTANT NOTICE:** You will not receive any distribution payments until we have received a complete set of correctly certified proof of identification, address and bank account documents as detailed below. Anti-money laundering and countering financing of terrorism regulations prohibit us from making any payment until we receive that documentation. If you need to provide alternative proof of identification, address or bank account documents, please contact us first at [transfers@evergreentrust.co.nz](mailto:transfers@evergreentrust.co.nz) to confirm they meet the applicable legal requirements.

If you are resident in the UK or you have not been tax resident outside the UK for five clear and consecutive UK tax years, receiving the distribution payment to your nominated bank account could have adverse UK tax consequences. You should seek professional tax advice from an independent qualified UK tax adviser before deciding on this option.

*(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 the page from your passport with your photograph on it. If your passport has expired, you must also provide a certified copy of your driver's licence. The certifications must be done by a Lawyer, Justice of the Peace, or Notary.</i>
<input type="checkbox"/> Certified proof of address	<i>A certified copy of a utility bill that is not more than 3 months old. The certification must be done by a Lawyer, Justice of the Peace, or Notary.</i>

<input type="checkbox"/> Certified proof of bank account	<p><i>A certified copy of a bank statement or letter from your bank confirming your bank account details that is not more than 3 months old. The certification must be done by a Lawyer, Justice of the Peace, or Notary.</i></p>
--	---

Nominated Bank Account Details	
Account Name <sup>1</sup> :	
Account Number <sup>1</sup> :	
Name of Bank <sup>1</sup> :	
Bank Address <sup>1</sup> :	
IBAN Number <sup>2</sup> :	
Swift/Sort Code <sup>3</sup> :	

<sup>1</sup> must be completed

<sup>2</sup> must be completed for bank accounts in Europe and countries where IBAN numbers are used

<sup>3</sup> must be completed where an IBAN number is not available

**Section 2: Request to Transfer the Distributions to another QROPS or UK Pension Scheme**

<input type="checkbox"/> QROPS & UK Pension Scheme Transfer Form	<p>Please download the <b>QROPS &amp; UK Pension Scheme Transfer Form</b> from the Documents page on the ERT website <a href="http://evergreentrust.co.nz/documents/">http://evergreentrust.co.nz/documents/</a> and return it along with this form. The <b>QROPS &amp; UK Pension Scheme Transfer Form</b> has instruction on how to complete it and what you need to provide.</p>
--	---