

Withdrawal Request UK Pension Monies Form



Please complete this form to request a payment from your Garrison Bridge Superannuation Scheme which includes UK sourced pension funds. UK tax provisions may apply if you are UK resident, or have been within the last ten tax years.

Member Details

Full Name

Garrison Bridge Member Number

Date of Birth (DD/MM/YYYY)

Bank Account Information

You must provide us with bank account details which is in the same name as your Garrison Bridge Superannuation Scheme holding.

Name of Account

Bank Name and Branch

Account Number

International SWIFT Details (if applicable)

Account Currency



Current Investment Strategy

Select which fund you are currently invested in and would like to withdraw from:

Please **indicate a % or a currency amount (\$/£)** for all of the existing funds.

Please note a withdrawal fee may apply.

NZD Conservative Passive Fund	<input type="text"/>	%	or	\$	<input type="text"/>
NZD Growth Passive Fund	<input type="text"/>	%	or	\$	<input type="text"/>
GBP Conservative Passive Fund	<input type="text"/>	%	or	£	<input type="text"/>
GBP Balanced Passive Fund	<input type="text"/>	%	or	£	<input type="text"/>
GBP Growth Passive Fund	<input type="text"/>	%	or	£	<input type="text"/>
AUD Balanced Passive Fund	<input type="text"/>	%	or	\$	<input type="text"/>

Lump Sum Payment

A Lump Sum payment of:

£/\$

GBP

AUD

NZD

Benefit Payments

Complete this section to withdraw a regular income or lump sum payment in accordance with the standard Garrison Bridge Superannuation Scheme rules.

Regular Income

Income Amount

<input type="text"/>	£/\$	<input type="checkbox"/>	Fortnightly	<input type="checkbox"/>	Monthly	<input type="checkbox"/>	Annually
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Start Date (DD/MM/YYYY)

End Date (if applicable)



Declaration

I confirm that I wish for the Manager of the scheme to proceed with the above withdrawal request. I understand that in making this withdrawal, in some circumstances a withdrawal of funds may be liable for tax. The Manager is required to report to HMRC all withdrawals within ten years of the original transfer date.

I confirm this withdrawal is under flexible access rules.

I understand Garrison Bridge will process withdrawal applications as they are received, but during non-trading periods it may take up to 14 business days to process the withdrawal.

Applicant Signature

Date of Declaration (DD/MM/YYYY)

The below outlines the personal identification documents we require in order to process the withdrawal request. These documents must either be certified by a trusted referee or verified by the adviser.

Applicant Signature

Identification

Proof of bank account

Sending Your Application

Please post or courier all original completed forms and supporting documents to our service centre:

Post: PO Box 10760, Wellington 6140, New Zealand

Courier: Level 3, 120 Featherston Street,
Wellington 6011, New Zealand

Contact Details

Website: www.garrisonbridge.co.nz

Email: super@garrisonbridge.co.nz

Phone: 0800 254 338

