

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 Cash Fund	%	or	\$NZD
NZD Conservative Fund	%	or	\$NZD
NZD Conservative Fund No. 2	%	or	\$NZD
NZD Balanced Fund	%	or	\$NZD
NZD Balanced Fund No. 2	%	or	\$NZD
NZD Growth Fund	%	or	\$NZD
NZD Growth Fund No. 2	%	or	\$NZD
NZD Australasian Equities Fund	%	or	\$NZD
NZD Bond Fund	%	or	\$NZD
NZD International Equities Fund	%	or	\$NZD
NZD Real Assets Fund	%	or	\$NZD
NZD UK Cash Fund	%	or	\$NZD
GBP Conservative Fund	%	or	£
GBP Balanced Fund	%	or	£
GBP Growth Fund	%	or	£
AUD Balanced Fund	%	or	\$AUD

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

£/\$

Fortnightly

Monthly

Annually

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 Lifetime Asset Management will process withdrawal transactions as they are received, withdrawals are normally processed in 4-9 business days, but may take longer during non-trading periods. A withdrawal across different currencies will use the prevailing exchange rate at the time of the withdrawal, which may be different than at the time we received your withdrawal request.

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 5, The Terrace,
Wellington 6011, New Zealand

Contact Details

Website: www.garrisonbridge.co.nz

Email: super@garrisonbridge.co.nz

Phone: 0800 254 338

