



# SERIOUS ILLNESS WITHDRAWAL APPLICATION FORM

Please complete and return to Whai Rawa, PO Box 13046, Christchurch OR scan and email to: whairawa@ngaitahu.iwi.nz

## Guide to Completing the Application

Withdrawal applications in the case of Serious Illness may be approved by the Manager (Whai Rawa Fund Limited) where a Member has suffered an injury, illness or disability that:

- a. results in the Member being totally and permanently unable to engage in work for which he or she is suited by reason of experience, education, or training or any combination of those things; OR
- b. poses a serious and imminent risk of death.

### FOR ASSISTANCE WITH COMPLETING THIS FORM, PLEASE GO TO:

**W** whairawa.com  
**P** 0800 942 472

Please note processing of request will normally take up to ten working days from receipt of completed application.

1. DETAILS OF ACCOUNT OWNER		
TITLE	FIRST NAMES	LAST NAME
PHYSICAL ADDRESS PO BOX ADDRESSES CANNOT BE VERIFIED		
COUNTRY (CURRENTLY LIVING IN)		POST CODE
EMAIL		
HOME PHONE	WORK PHONE	MOBILE
DATE OF BIRTH	PLACE OF BIRTH	MOTHER'S MAIDEN NAME
YOUR SIX DIGIT WHAI RAWA NUMBER (IF KNOWN)	PLEASE ATTACH A COPY OF YOUR PHOTO IDENTIFICATION (E.G. DRIVER'S LICENSE OR PASSPORT, ETC.)	PLEASE ATTACH A COPY OF YOUR PROOF OF ADDRESS (DATED WITHIN THE LAST 6 MONTHS) E.G. A BANK STATEMENT OR UTILITY BILL
Are you currently an undischarged bankrupt or subject to bankruptcy proceedings?		
Please note if you are an undischarged bankrupt, the Official Assignee will need to authorise any application being made. Please talk to them before proceeding with this application.		YES <input type="checkbox"/> NO <input type="checkbox"/>

TAX INFORMATION (Please complete all fields in this section; IRD, PIR and RSCT details)

IRD Number

Non NZ Resident  NZ Resident   
(PLEASE CONTINUE TO NEXT SECTION) (PLEASE COMPLETE PIR DETAILS BELOW)

CALCULATE YOUR PIR TAX RATE (PLEASE TICK ONE BOX)	CALCULATE YOUR RSCT TAX RATE (PLEASE TICK ONE BOX)
<p><b>Before you start, you will need to know your income for the last two tax years ending 31 March (including income from PIE investments).</b> If you're unsure, you can contact your employer(s), your accountant, or Inland Revenue.</p> <p>Are you a New Zealand tax resident? <input type="radio"/> NO → YOUR PIR IS 28% <input type="checkbox"/> <input type="radio"/> YES →</p> <p>IN EITHER OF THE LAST TWO INCOME YEARS (ENDING 31 MARCH):</p> <p>Was your taxable income \$14,000 or less (excluding income from PIEs); AND your total taxable income (plus PIE and non-PIE income) \$48,000 or less? <input type="radio"/> YES → YOUR PIR IS 10.5% <input type="checkbox"/> <input type="radio"/> NO →</p> <p>Was your taxable income \$48,000 or less (excluding income from PIEs); AND your total taxable income (plus PIE and non-PIE income) \$70,000 or less? <input type="radio"/> YES → YOUR PIR IS 17.5% <input type="checkbox"/> <input type="radio"/> NO →</p> <p>Was your taxable income \$48,000 or more; OR your total taxable income (plus PIE and non-PIE income) \$70,000 or more? <input type="radio"/> YES → YOUR PIR IS 28% <input type="checkbox"/> <input type="radio"/> NO →</p>	<p>Are you a New Zealand tax resident? <input type="radio"/> NO → YOUR RSCT RATE IS 33% <input type="checkbox"/> <input type="radio"/> YES →</p> <p>IN EITHER OF THE LAST TWO INCOME YEARS (ENDING 31 MARCH):</p> <p>Was your taxable income \$14,000 or less? <input type="radio"/> YES → YOUR RSCT RATE IS 10.5% <input type="checkbox"/> <input type="radio"/> NO →</p> <p>Was your taxable income \$48,000 or less? <input type="radio"/> YES → YOUR RSCT RATE IS 17.5% <input type="checkbox"/> <input type="radio"/> NO →</p> <p>Was your taxable income \$70,000 or less? <input type="radio"/> YES → YOUR RSCT RATE IS 30% <input type="checkbox"/> <input type="radio"/> NO → YOUR RSCT RATE IS 33% <input type="checkbox"/></p>



## 2B. CONTINUED

SIGNED

DATE

PRACTICE STAMP

## 3. AMOUNT REQUESTED

ALL APPLICANTS ARE TO COMPLETE THIS SECTION

How much money are you requesting?  **OR** The full account balance of my Whai Rawa account

I have attached my pre-printed bank account details

### Verification of bank account details

To be able to make payment, the bank account should be in the Member's name (or other party where applicable) and proof of your account details must be supplied with this application i.e. copy of the top half of a bank statement or deposit slip. Alternatively, confirmation from the bank by email is acceptable.

## 4. DECLARATION

1. I am requesting a withdrawal from my Whai Rawa account for the circumstances outlined above.
2. All information provided in this form and any other information provided by me relating to this withdrawal request is true and correct.
3. There is no additional information that I have not provided that may be relevant to this withdrawal request.
4. If any of the information provided becomes incorrect or if I become aware of any other information that may be relevant to this request before payment of the withdrawal is made, I will immediately notify Whai Rawa.
5. I understand that the Prescribed Investor Rate (PIR) at which earnings are taxed and which are payable annually and when funds are withdrawn or transferred, is either 10.5%, 17.5% or 28% depending on my income.
6. I understand that tax may be overpaid or underpaid within Whai Rawa on my behalf if I have provided the wrong Prescribed Investor Rate (PIR), not updated my PIR when it needed to be changed, or not provided my correct IRD number. In the event of an underpayment of tax I will be obliged to pay the shortfall and additional tax (potential penalties and/or penalty interest) to IRD, and may have to file a tax return.)
7. I authorise Whai Rawa to disclose to and to collect from any person, personal and financial information about me for the purposes of processing the withdrawal for which I have applied.
8. I understand that the personal information I have provided on this form will be used to update my personal record with Whai Rawa.
9. If I am signing this application on behalf of someone else (including as a legal representative), I am lawfully able to provide the above declarations.

## STATEMENT OF PERSONAL INFORMATION RIGHTS

This statement relates to information about you which you are providing on this application form to Mercer N.Z. Limited, as administrator of Whai Rawa ("Mercer"), Trustees Executors Limited, Whai Rawa Fund Limited, Te Rūnanga o Ngāi Tahu and any other person involved in the administration or management of Whai Rawa which from time to time may hold information about you now or in the future. Each recipient of personal information will ensure that the personal information it receives is held securely and will not disclose it to any other person, except for the purposes of administering or providing services in connection with Whai Rawa, the operations of Te Rūnanga o Ngāi Tahu and for any other purpose referred to in this statement which has been authorised by you or when required or authorised by law. The failure to provide the information sought may result in your application being declined. The Privacy Act 1993 gives you the right to access and request the correction of personal information held by the entities referred to above. The personal information will be used primarily to administer and provide services in connection with Whai Rawa, but may also be used to further the relationship between you and Te Rūnanga o Ngāi Tahu. This includes the provision of any products, services or information by Te Rūnanga o Ngāi Tahu which it considers may be of interest to you.

I FULL NAME OF APPLICANT

of ADDRESS

confirm I have read and understood the above declaration.

SIGNED

DATE



## CHECK LIST



**Section 1** is completed along with proof of identity and proof of address



**Section 2** is completed including your doctors declaration, practice stamp and additional evidence, if applicable



**Section 3** is completed with proof of your bank account details attached



**Section 4** is completed - you have read and signed the declaration

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