



**Section B Serious Illness**

Serious illness means an injury, illness or disability that results in your being totally and permanently unable to do work you are suited to (because of experience, education, training or a combination of these) or illness that poses a serious and imminent risk of death.

**For a serious illness withdrawal:**

- ask your doctor to complete the doctor’s declaration section of this form.
- If you have a temporary illness or incapacity, please also complete Section C - Significant Financial Hardship

**Doctor’s Declaration of Serious Illness**

**PATIENT**

Full Name \_\_\_\_\_  
*First Name(s) Surname*

Address \_\_\_\_\_  
*Street Address or PO Box Number*

\_\_\_\_\_ *Suburb, Box Lobby or RD* \_\_\_\_\_ *Town or City* \_\_\_\_\_ *Postcode*

**PATIENT**

I, Dr. \_\_\_\_\_  
of \_\_\_\_\_  
*Town or City*

Contact Numbers \_\_\_\_\_  
*Daytime Mobile*

Email Address

certify that:

- I am a registered medical practitioner with the Medical Council of New Zealand
- The above-named is a patient of mine and I have recently given him/her a full medical examination
- In my opinion, the above-named has an injury, illness or disability (*delete options below that don't apply*) which:
  - results in them being totally and permanently unable to engage in work they are suited for (because of experience, education or training, or any combination of these) or;
  - poses a serious and imminent risk of death.
  - poses a temporary incapacity which prevents them from being able to engage in their normal work.

I form this opinion based on (give a brief description of the patient’s condition):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



**Assets and Liabilities** *Enter all business and private assets and liabilities*

**LIABILITIES/DEBTS (show details)**

Mortgages	Bank/Institution _____	Value	\$ _____
	Bank/Institution _____	Value	\$ _____
Loans	Bank/Institution _____	Value	\$ _____
	Bank/Institution _____	Value	\$ _____
Bank Overdraft	Bank/Institution _____	Limit	\$ _____
	Bank/Institution _____	Limit	\$ _____
Credit Cards	Type _____	Limit	\$ _____
	Type _____	Limit	\$ _____
Leases	Item _____	Balance to Pay	\$ _____
	Date Purchased ____/____/____      Finish Date ____/____/____	Balance to Pay	\$ _____
Trade Accounts	Account Name _____	Value	\$ _____
	Account Name _____	Value	\$ _____
	Account Name _____	Value	\$ _____
Other debts (eg with Dept. for Courts, Dept. of Work and Income)	Name of Debt _____	Value	\$ _____
	Name of Debt _____	Value	\$ _____
<b>Total Liabilities</b> (add all amounts in the right hand columns and print total in Box F)			<b>F</b> \$ _____

**Income** *Enter all income, including details of spouse or partner's income*

**WEEKLY INCOME (after tax)**

Salary/Wages/Pension/Drawings	\$ _____	<i>Attach copy of last payslip</i>
Part-time Work	\$ _____	<i>Attach copy of last payslip</i>
Spouse or Partner's Income	\$ _____	<i>Attach copy of last payslip</i>
Self-employed Income	\$ _____	
Child Support Received	\$ _____	
Working for Families Tax Credits*	\$ _____	<i>*Previously know as Family Assistance</i>
Department of Work and Income Benefit/Superannuation	\$ _____	
Rent/Board Received	\$ _____	
Interests/Dividends	\$ _____	
Other (specify) _____	\$ _____	
_____	\$ _____	
<b>Total Weekly Income</b> (add all amounts in the column and print total in Box A)		
	<b>A</b> \$ _____	

**Expenses**

*Enter all expenses, including details of spouse or partner's expenses*

**WEEKLY PAYMENTS**

Food/Groceries	\$	
Rent/Board/Mortgage	\$	
Bus/Train/Petrol	\$	
Child care/School Expenses	\$	
Child Maintenance Payments	\$	
Other (specify) _____	\$	
_____	\$	

**Total Weekly Payments** (add all amounts in the column and print total in Box B)

**B** \$

**MONTHLY PAYMENTS** *(to convert monthly payments to weekly payments, multiply by 12 and divide by 52 and put this figure in the weekly column)*

	monthly	weekly
Gas/Electricity	\$	\$
Telephone/Mobile	\$	\$
Clothing	\$	\$
Lease Payments	\$	\$
Hire Purchase	\$	\$
Credit Cards	\$	\$
Other (specify) _____	\$	\$

*Attach copy of current statement*

*Attach copy of last statement*

**Total Weekly Payments** (add all amounts in the weekly column and print total in Box C)

**C** \$

**ANNUAL PAYMENTS** *(to convert annual payments to weekly payments, divide by 52 and put this figure in the weekly column)*

	annual	weekly
Vehicle Insurance <i>(eg. car, boat caravan)</i>	\$	\$
Vehicle Registration/Warrant	\$	\$
House and Contents Insurance	\$	\$
Rates	\$	\$
Medical Insurance/Expenses	\$	\$
Life Insurance/Superannuation	\$	\$
Other (specify) _____	\$	\$

**Total Annual Payments** (add all amounts in the weekly column and print total in Box D)

**D** \$

**Office use only** - Calculation: Income (Box A) less Expenses (Box B + Box C = Box D) = balance

\$



**Section D Member Declaration**

I, \_\_\_\_\_  
*Full name*

of \_\_\_\_\_

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*Occupation*

- request a withdrawal from my KiwiSaver account under the provisions of significant financial hardship
- confirm that I have explored reasonable alternative sources of funding and their limits
- verify that the completed income, expenditure and statement of financial position documents attached are true and correct to the best of my knowledge

**Applicants' Signature** \_\_\_\_\_

**on** \_\_\_\_\_  
*Day* \_\_\_\_\_ *Month* \_\_\_\_\_ *Year* \_\_\_\_\_

**Before me** \_\_\_\_\_  
*(please print)*

\_\_\_\_\_  
*Justice of the Peace, or solicitor of the High Court of New Zealand, or other person authorised to take statutory declarations.*

**Signature** \_\_\_\_\_

**Send this declaration to:** Aon New Zealand Limited  
PO Box 3167  
Auckland

- CHECKLIST:**
- I have**
- Completed Section B - Serious Illness
  - Completed Section C - Significant Financial Hardship
- I have attached**
- Copy of bank deposit slip
  - Copy of payslip(s)
  - Copy of bank account statements
  - Copy of overdue accounts and loans
  - Copy of credit card statements