



# Temporary Retirement Category Visitor Visa Guide

for a temporary stay in New Zealand

## Information about this guide

The purpose of this guide is to help you complete the *Temporary Retirement Category Visitor Visa Application (INZ 1172)*.

Boxes like this **B2** refer to questions in the application form.

### False information

If you supply false information in or omit relevant information from your application form, your visitor visa application may be declined. Be aware that we may verify any documents you provide.

### Investment funds

If your application is approved you must retain your investment funds in acceptable investment(s) in New Zealand for two years, and hold acceptable travel and/or health insurance for the duration of your visitor visa (two years).

## How to apply

### Complete the form in full

You must complete all the questions in the form unless the form specifically directs you to another question or a section further on. If a question does not apply to you, mark it 'N/A' or 'not applicable'. If you don't answer a question, we may send the incomplete form back to you.

Complete the form in English.

### Enclose supporting documents

You will need to provide us with documents that support the claims you have made in the application form.

**All documents provided in support of your application must be either originals or certified copies.**

You must also attach two identical passport-size (4.5cm by 3.5cm) colour photographs taken within the last six months for each person included in your application. Write the person's name on the back of each photograph.

### Enclose the fee and applicable levies

For more information about fees and levies see our website [www.immigration.govt.nz](http://www.immigration.govt.nz)

### Submit your form

Send your application to:

Immigration New Zealand  
PO Box 50728  
Porirua 5240  
New Zealand

## Documents

### Certified copies

All documents provided in support of your application must be either originals or certified copies. If you send certified copies, Immigration New Zealand (INZ) may ask for originals at a later date. Certified copies are photocopies that have been stamped or endorsed by a person who confirms that the copy is a true copy of the original. The person who certifies the copy must be authorised to do so by law in your home country or in New Zealand (e.g. a Justice of the Peace, notary public, lawyer or court official).

## Translations

If any of your documents are not in English, you must have them translated into English by a person who is familiar with both English and the language in which the documents are written. Any translation provided must:

- not be made by your family member or a person with an interest in the outcome of the application
- be certified as a correct translation made by a person familiar with both languages and competent in translation work
- be prepared and certified by a recognised private or official translation service
- be on the official letterhead of the translation service
- bear the stamp or signature of the translator
- be accompanied by the original documents or certified copies, and
- be paid for by the applicant.

Translations may be prepared by:

- the Translation Service of the New Zealand Department of Internal Affairs
- language departments of secondary schools or universities
- reputable people within the community who are known to translate documents accurately
- embassies, if the translation is endorsed with the appropriate embassy seal, or
- any other recognised or official translation service.

## Travel and/or health insurance requirements

Under the Temporary Retirement Category the principal applicant and their partner included in the application must hold travel and/or health insurance with a minimum annual policy limit of NZ\$500,000 for the duration of the two-year visa.

Your insurance must be provided by a company with:

- experience in the health and/or travel insurance business; and
- a credit rating of no lower than A (strong) or equivalent from an internationally recognised credit rating agency (for example, Standard and Poors).

For the duration of your Temporary Retirement Category visa, your insurance must cover the costs of:

- all medical expenses including diagnosis and treatment, ambulance, hospital care; and
- prescribed medicines, post hospital discharge care, home nursing care up to a limit of NZ\$3,000; and
- emergency dental care, including provision of antibiotics and treatment for the relief of sudden and acute pain up to a limit of NZ\$3,000; and
- evacuation or return home in the event of serious illness or disability.

Despite the above, your travel and/or health insurance may exclude costs related to:

- suicide, attempted suicide; or
- any situation or action when under the influence of alcohol or non-prescribed drugs; or
- human immunodeficiency virus (HIV) and/or HIV – related illness including acquired immune deficiency syndrome (AIDS); or
- pre-existing conditions; or
- elective cosmetic treatment; or
- pharmaceuticals available over the counter; or
- pharmaceuticals required to be taken on a regular basis; or
- assisted reproductive services.

If your application is approved in principle you, and your partner if applicable, will need to provide evidence that you hold acceptable travel and/or health insurance before any visas are granted. Also, if the initial insurance policy is valid for less than 24 months, evidence must be provided showing that it can be renewed to cover the 24-month period.

Evidence can include an insurance certificate or letter of approval from an insurance company.

## Your family

You may include your partner in the application but not your children.

## Assessing your application: bona fides

When we assess your application and the information you provide, we ensure that it meets all the requirements of the visa you are applying for. This includes the requirement to be 'bona fide', which means you genuinely intend a temporary visit to New Zealand.

When we assess if you are a bona fide visitor, we consider all of the information that we have. For example, we will consider:

- your personal circumstances, such as:
  - your family ties in your home country and New Zealand;
  - personal, financial, employment or other commitments in your home country and New Zealand;
  - any circumstances that might mean you may not want to return to your home country when any visa expires,
- information that we have about previous applications, such as whether you have previously overstayed or breached visa conditions,
- whether you have dependants who are unlawfully in New Zealand, and
- your ability to leave or be deported from New Zealand to your country of citizenship.

INZ will consider all of the information you provide in support of your application but is not obliged to ask you for more. So, with evidence that you meet the particular requirements for the type of visa you are applying for, you should provide any evidence that you think demonstrates that you are a bona fide applicant.

### **New Zealand Business Number**

You must indicate the New Zealand Business Number (NZBN) of all New Zealand businesses included in the form. For help, you can go to [www.nzbn.govt.nz](http://www.nzbn.govt.nz)

### **Additional information**

Make sure you keep us informed of any change in your circumstances or in the information you have provided. You may provide additional information or documents after your application has been accepted for consideration, but you must do so before we make our final decision. Once a final decision has been made on your application, we won't accept any further information or documents.

### **Interim visas**

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If we haven't made a decision on your visitor visa application when your current visa expires, we will normally grant you an interim visa. We will tell you by email or letter whether we grant you one. You don't need to apply for an interim visa and there is no fee.

The interim visa will let you stay in New Zealand while we make a decision on your application. Its conditions (including whether you can work) will depend on the type of visa you hold and the type of visa you have applied for. Your interim visa will expire after six months if we haven't made a decision on your application in that time. If we decline your application, your interim visa will expire 21 days later.

## Completing Section A Principal applicant's personal details

The principal applicant is the main person who will be assessed against the instructions.

### A6 Date of birth

You cannot be approved under the Temporary Retirement Category if you are aged 65 years or younger when you make your application.

You must provide an original or a certified copy of your full birth certificate.

### A11 Partnership status

Tick 'Married/in civil union' if you are legally married or in a legal civil union with your partner. Tick 'Partner' if you have a de facto partner (i.e. a partner with whom you live, but you are not legally married to them, or in a legal civil union with them).

Where the term 'partner' is used elsewhere in the form or guide, it includes both legal and de facto partners.

## Completing Section B Contact details

You can complete and submit your residence application yourself or you can ask another person – such as a friend, lawyer, or immigration adviser – to help you. We refer to people who help you in this way as your 'adviser'. We give all applicants equal treatment so you are free to choose whether to use an adviser.

Please be aware of the following if you do decide to use an adviser.

- You can give your own address or your adviser's address as our point of contact at **B3**.
- If you give your adviser's address at **B3** and indicate at **B4** that you want Immigration New Zealand to communicate only with this person, we will send them all correspondence about your residence application. However, there may be times when we want to work directly with you to seek further information or evidence about the information you have provided in your residence application.
- If you stop using the services of your adviser, or begin using the services of another adviser, you will need to tell your former adviser and tell your assigned case officer in writing (letter, fax or email) or we will continue to deal with your former adviser. If you are changing your immigration adviser, please use the form *Immigration Adviser Details (INZ 1160)*.
- You are responsible for all information and documents you submit with your residence application as well as all information and documents that your adviser submits on your behalf.

## Completing Section C Partner's personal details

### C1 Partnership status should be described as in **A9**

↓ If your partner is included in this application, you must provide evidence that you are living together in a genuine and stable relationship.

### C3 If you and your partner have been living separately for any period during your relationship, you should provide evidence of the length of the periods of separation, the reasons for them, and how your relationship was maintained during the periods of separation. Such evidence may include letters, itemised telephone accounts or e-mail messages.

Evidence may include (but is not limited to) original or certified copies of documents such as:

- your marriage certificate
- birth certificates of any children you have had together
- evidence of communication between you both
- photographs of you both together
- documents indicating public recognition of your partnership

- evidence of you and your partner being committed to each other both emotionally and exclusively, for example:
  - joint decision-making and planning
  - shared parental obligations
  - shared household activities
  - shared companionship/spare time
  - shared leisure and social activities
  - you and your partner appearing to be a couple to outsiders.
- evidence of being financially interdependent, for example:
  - shared income
  - joint bank accounts operated reasonably frequently over a reasonable time
  - joint assets
  - joint liabilities such as loans or credit to purchase real estate, cars, major home appliances
  - joint utilities accounts (electricity, gas, water, telephone)
  - mutually agreed financial arrangements.

#### **C6** Your partner's birth certificate

You must provide an original or a certified copy of your partner's full birth certificate.

### Completing Section D Character

You and your partner (if applicable) need to be of good character to be approved under the Temporary Retirement Category.

Every person included in your application must provide police certificates from:

- their country(ies) of citizenship, and
- any country in which they have lived for five years or more since the age of 17 years.

If you have already provided police certificates with another application that were issued within the last six months you do not have to provide more certificates. You will need to provide details of the previous application with your current application.

If required, your police certificates must be less than six months old when we receive your application.

For more information, see our website [www.immigration.govt.nz/policecertificate](http://www.immigration.govt.nz/policecertificate).

- D3** If you have been previously removed, deported or excluded from any country, you may not meet character requirements and may not be eligible to be granted a visa. You must declare if you have been removed, deported or excluded from any country, excluding New Zealand.

### Completing Section E Additional details

The questions in this section apply to every person included in this application aged 17 years and over.

### Completing Section F Health

You and your partner (if included) need to be in good health to be granted a visitor visa under the Temporary Retirement Category. The questions in this section apply to you and your partner (if included).

- F1** The purpose of the questions at **F1** and **F2** is to find out whether you may have a medical condition for which a medical waiver cannot be granted. If you answer 'yes' at **F1** or **F2**, make sure you provide a full explanation of your circumstances so we can assess your medical condition(s).
- F2**

**F5** You and your partner (if included) are required to provide a completed *General Medical Certificate (INZ 1007)* and a *Chest X-ray Certificate (INZ 1096)*, unless you have previously provided these certificates and they were issued less than 36 months ago.

If you and your partner (if included) have provided a medical certificate and chest X-ray certificate within the last 36 months, you do not need to provide further certificates unless:

- the health status of you or your partner has deteriorated since your previous certificates were issued, or
- you have been requested in writing by an immigration officer to provide updated certificates; or
- you or your partner have spent six consecutive months since your last chest X-ray certificate was issued, in a country, area or territory not listed as having a low incidence of TB (see the leaflet *Health Requirements (INZ 1121)* for further information).

If you and your partner (if included) are required to provide a medical certificate and chest X-ray certificate, they must be less than three months old when we receive your application.

**Note:** Pregnant women are not required to have an X-ray, unless a special report is required.

In most countries we require the medical examinations to be carried out by one of a selected panel of medical practitioners or institutions. The details of these countries and the names and addresses of the approved panels are listed on our website. Alternatively you can contact your closest INZ office.

### Submitting your medical and chest X-ray certificates

Refer to the leaflet 'Health Requirements Guide' for further information.

## Completing Section G Age

You must provide suitable evidence of your age, which can include (but is not limited to) original or certified copies of your:

- full birth certificate
- passport or other document
- identity document (if this contains your birth details).

## Completing Section H Investment funds

**H1** To be approved under this category you must invest NZ\$0.75 million in New Zealand for two years.

**H2** If you can indicate briefly the kind of investment you propose to undertake, we may be able to provide contacts and information to assist you.

### **H5** Ownership of funds and/or assets

Funds and/or assets must be owned either by you, or jointly by you and your partner included in your application. If the funds and/or assets you are nominating are partly owned by your partner you may only claim the full value if you meet the minimum requirements for the recognition of partnerships (see Completing Section C: Partner's personal details). If you do not meet the minimum requirements for recognition of partnerships, or you own the funds and/or assets with someone who is not your partner and/or dependent child, you may only claim the value of that portion of the funds and/or assets for which you can provide evidence of ownership.

### **H6** Type and location of funds and/or assets

You need to state the type, location and value of the funds and/or assets that you are nominating. The value should be net of any mortgages or borrowings.

If you are nominating funds, make sure you include the name of the bank/institution in which the nominated funds are held. If you are nominating assets, make sure you describe the nominated assets sufficiently clearly to enable them to be easily identified.

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**H7** How did you earn these funds and/or assets?

Funds and/or assets must have been earned or acquired legally. We may not be able to approve your application if the way in which you earned or acquired your funds and/or assets would have breached New Zealand criminal law if they had been earned or acquired in the same manner in New Zealand.

**H8** List your earnings for at least the last five years. If your funds and/or assets came from earnings from earlier years, you will need to provide appropriate evidence from that time.

**H9** Were any of these funds and/or assets gifted to you?

You may nominate funds and/or assets which have been given to you unconditionally and in accordance with local law. You will need to show that your donor earned or acquired those funds and/or assets legally.

If some of your funds and/or assets have been acquired by inheritance you will need to include appropriate evidence to show they were acquired lawfully (e.g. probate and evidence from your solicitor).

**H10** Evidence of funds and/or assets

You need to provide evidence to support the claims that you own your investment funds and/or assets and have earned or acquired them legally.

**Acceptable evidence of the value and ownership of funds and/or assets may include:**

Cash

- original bank books/statements.

Property

- original title deeds, and
- a recent valuation report for your property from an independent registered adviser, and
- mortgage documents or statements showing any liability incurred on the property.

Shares/bonds

- share certificates
- share printout reports
- share trading cards (if applicable)
- a recent statement by a registered share broker or chartered accountant that certifies the current market value of your shares and bonds.

Business

- documents of ownership, or financial interest in, the company/business, and
- an independent valuation by a chartered accountant (or appropriate person), including details of any mortgages, loans, or other financial obligations.

Other assets (e.g. gold bullion)

- evidence of ownership, and
- a recent independent market valuation.

These documents must support the claims you make in your application form about the type and location of your funds. All documents provided as valuations of assets must be no more than three months old when you make your application and must be produced by a reliable, independent agency.

**Acceptable evidence to show how you earned or acquired your funds and/or assets may include:**

Salaries and bonuses

- personal tax returns or tax certificates
- pay slips
- letters of appointment
- employer certificates
- bank statements showing receipt of earnings.

#### Business profits and dividends

- business financial statements
- evidence of ownership or shareholding in the business
- bank statements showing receipt of dividends.

#### Property

- evidence of capital appreciation of property, measured as the current value (or sale price if property has been sold) less purchase price and mortgage (if applicable), eg solicitor's settlement documents, bank statements showing your receipt of sale proceeds, valuation report for property currently owned.

#### Investments

- bank certificates
- evidence of share trading profits

#### Inheritance

- probate and evidence of inheritance from your solicitor

#### Gifts

- evidence of gifting, and evidence to show that your donor earned or acquired those funds and/or assets legally.

We may ask you to produce other information to help us determine your application.

#### Transfer of funds to New Zealand

Be aware that, if your application is approved in principle, you will need to be able to transfer your nominated investment funds directly to New Zealand through the banking system. This is to enable a verifiable record to be established showing the link between your nominated funds and/or assets (and your earnings), and the funds that are transferred to New Zealand.

### Completing Section I Declaration by applicant

The declaration must be signed by you and any applicant included in your application. It is your responsibility to ensure that you and everyone included in your application understand the declarations before you sign.

If you have any questions about the declarations, please contact the Immigration Contact Centre toll free on 0508 55 88 55 (if you are in New Zealand) or on +64 9 914 4100.

### Completing Section J Immigration adviser's details

If an immigration adviser has assisted you to complete this form then they must complete this section.

### Completing Section K Declaration by person helping the applicant to complete this form

Make sure that anyone who has helped you complete the form by explaining, translating, or filling it in, understands and signs the declaration in this section.

### Completing Section L Paying your application fee and levies

You need to pay a fee and applicable levies when you submit your application, unless you are not required to do so. Details on fees and levies are listed on our website [www.immigration.govt.nz](http://www.immigration.govt.nz) and in our *Fees Guide (INZ 1028)*. Payment must be in New Zealand dollars. No other currency will be accepted. Cash is not accepted.