

Nomination of Beneficiary Form



Tax Minimiser Investment Bond

Please **PRINT** clearly in **BLACK or BLUE** pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

1. Investor Details

Policy Number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Title	<input checked="" type="checkbox"/> Mr <input checked="" type="checkbox"/> Mrs <input checked="" type="checkbox"/> Ms <input checked="" type="checkbox"/> Miss	Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Name in full	<input type="text"/>		
Residential address (not a PO Box)	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Phone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		

2. Declaration

I/We

holder/s of the above policy/ies, hereby revoke any nomination previously made by me/us in respect to the monies payable by the said Society at my/our death, and I/we hereby nominate the beneficiaries set out hereunder, to receive the said monies payable upon my/our death in accordance with the Fund Rules of the above Society.

Your personal information will be collected, used and disclosed by us in accordance with our Privacy Policy and in accordance with the law. You can obtain a copy of our Privacy Policy via our website australianunity.com.au/privacy-policy or by telephone 1300 1300 38.

3. Nomination of Beneficiaries

(Total proceeds must equal 100%)

Beneficiary 1

Title	<input checked="" type="checkbox"/> Mr <input checked="" type="checkbox"/> Mrs <input checked="" type="checkbox"/> Ms <input checked="" type="checkbox"/> Miss	Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Beneficiaries surname	<input type="text"/>		
Beneficiaries given name(s)	<input type="text"/>		
Residential address (not a PO Box)	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Relationship to sponsor	<input type="text"/>	% of Benefit	<input type="text"/> <input type="text"/> <input type="text"/> %

Beneficiary 2

Title Mr Mrs Ms Miss Date of birth / /

Beneficiaries full name

Residential address (not a PO Box)

Suburb State

Postcode Country

Relationship to sponsor % of Benefit %

Beneficiary 3

Title Mr Mrs Ms Miss Date of birth / /

Beneficiaries full name

Residential address (not a PO Box)

Suburb State

Postcode Country

Relationship to sponsor % of Benefit %

4. Declaration and Signature(s)

All investor signatories must sign below:

Plan Sponsor 1 signature

Name of Plan Sponsor 1

Date / /

Plan Sponsor 2 signature

Name of Plan Sponsor 2

Date / /



Return by post

Australian Unity - Investment bonds, Reply Paid 89, Adelaide SA 5001
(no stamp required if mailed in Australia)

If posting from outside of Australia, please send to Head Office:
114 Albert Road, South Melbourne VIC 3205



Fax

1800 804 890



Email

enquiries@australianunity.com.au

Contact us

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