

Nomination of Beneficiary Form



Lifepan TaxSmart Investments

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

Title Mr Mrs Ms Miss Date of birth / /

Surname

Given name(s)

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

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 on 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.

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 Mr Mrs Ms Miss Date of birth / /

Beneficiaries surname

Beneficiaries given name(s)

Residential address (not a PO Box)

Suburb State

Postcode Country

Relationship to investor % of Benefit %

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 investor % 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 investor % of Benefit %

4. Signature(s)

All investor signatories must sign below:

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 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

- Australian Unity
114 Albert Road, South Melbourne VIC 3205
- australianunity.com.au/wealth

Investor Services

- enquiries@australianunity.com.au
- 1300 1300 38
- 1800 804 890

Adviser Services

- investmentbonds@australianunity.com.au
- 1300 133 285
- 1800 804 890