



No How many beneficiaries are there?   Please provide the full name of each beneficiary below.

**Beneficiary 1**

Title  Mr  Mrs  Ms  Miss Other (please specify)

Surname

Given name(s)

**Beneficiary 2**

Title  Mr  Mrs  Ms  Miss Other (please specify)

Surname

Given name(s)

If there are more beneficiaries, please provide details on a separate sheet.

**1D: Trustee Details** (only complete if 'Other Trust Type' is selected in Step 1B)

Do not complete if the trust is a registered managed investment scheme, regulated trust (eg. SMSF) or government superannuation fund.

How many trustees are there?   Please provide the full name of each Trustee below.

**Trustee 1**

Surname

Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

**Trustee 2**

Surname

Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

**Trustee 3**

Surname

Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

**Trustee 4**

Surname

Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

If there are more trustees, please provide details on a separate sheet.

## 2: Trust Identification Procedures

If a registered managed investment scheme, regulated trust (eg. SMSF) or government superannuation fund is selected in step 1B, verify in Part A:

- The full name of the trust.
- That the trust is a registered managed investment scheme, regulated trust or government superannuation fund, as applicable.

### Part A: Acceptable ID Documents (to verify the trust)

Select one of the following options used to verify the trust.

A search of the ASIC, ATO or relevant regulator's website (eg. "Super Fund Lookup" at [www.abn.business.gov.au](http://www.abn.business.gov.au)).

A copy or relevant extract of the legislation establishing the government superannuation fund sourced from a government website.

If other trust type is selected in step 1B, verify in **Part B**.

### Part B: Acceptable ID Documents (to verify the trust)

Select one of the following options used to verify the trust.

An original or certified copy or certified extract of the trust deed.

A notice issued by the Australian Taxation Office within the last 12 months (eg. a Notice of Assessment).  
Block out the TFN before scanning, copying or storing this document.

A letter from a solicitor or qualified accountant that confirms the name of the trust.

A Disclosure Certificate. Please contact Lifeplan Customer Services on 1300 1300 38 for details.

Documents that are written in a language that is not English, must be accompanied by an English translation prepared by an accredited translator.

## 3. Trust Declaration

I/We have no reason to suspect that the contribution lodged with the application or any subsequent contributions is or will be derived from or related to any money laundering, terrorism financing or other illegal activities.

I confirm that an Australian Unity Investment Bonds Investor Identification for Individuals and Sole Traders form has also been completed for each Individual trustee listed.

I confirm that an Australian Unity Investment Bonds Investor Identification for Companies form has also been completed for each Australian Company trustee listed.

A certified copy of each document is to be attached to this completed form (do not send originals). Each page of a copy must be certified as a true copy. Please sign here confirming that all information being forwarded is correct.

**Signature**

Date

**Persons who may certify documents**

A certified copy means a document that has been certified as a true copy of an original document by one of the following persons:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described).
- A judge of a court or a magistrate.
- A chief executive officer of a Commonwealth court.
- A registrar or deputy registrar of a court.
- A Justice of the Peace.
- A notary public (for the purposes of the Statutory Declaration Regulations 1993).
- A police officer.
- An agent of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public.
- An officer with 2 or more continuous years of service with one or more financial institution (for the purposes of the Statutory Declaration Regulations 1993).
- An officer with, or authorised representative of, a holder of an Australian financial services license, having 2 or more continuous years of service with one or more licensees.
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.

**The certifier must:**

**Write the following wording, or similar, on the copy of your documents:**

Example, for identity verification documents that contain a photograph of you “I certify that I have seen the original documentation and that the photograph is a true likeness and this copy is a complete and accurate copy of that original.”

Example, for other identity verification documents “I certify that I have seen the original documentation and this copy is a complete and accurate copy of that original.”

**Sign and date each page of the photocopy.**

**Add their name in block capitals along with their position/ capacity, address and daytime contact telephone number (not a mobile phone). The certifier may be contacted by us.**

**Add the official stamp of their office, if possible.**

**OFFICE USE ONLY**

**Document Details**

Original Viewed  Certified Copy Viewed  Attached  Not Attached  Performed Search

**Information**

**Document 1**

**Document 2 (if required)**

Document Issuer/Website

Issued/Search Date   /   /

/   /

Expiry Date   /   /

/   /

Document Number

English Translation Required Sighted  Yes  No

Sighted  Yes  No

Signed by

Date   /   /



### **Return by post**

(together with any identification documents where relevant)

**Australian Unity, 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**

#### **Contact us**



Australian Unity  
114 Albert Road, South Melbourne VIC 3205



[australianunity.com.au/wealth](https://australianunity.com.au/wealth)

#### **Investor Services**



[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)



1300 1300 38



1800 804 890

#### **Adviser Services**



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1300 133 285



1800 804 890