

# Plan Beneficiary Nomination Form



## Commonwealth Bank Education Savings Plan

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  /  /

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode  Country

Phone  Mobile

Email

### 2. Declaration

I/We

Investor(s) of the above plan, hereby revoke all previous nominations of plan beneficiaries made by me/us, and nominate the following person(s) to receive the proceeds of any residual plan investment should my/our current nominated student die after the death of the last surviving joint investor in accordance with the governing rules of the Plan.

### 3. Nomination of Plan Beneficiaries (total proceeds must equal 100%)

#### Beneficiary 1

Title  Mr  Mrs  Ms  Miss Date of birth  /  /

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode  Country

Email

Relationship to investor(s)  % of Benefit  %

#### Beneficiary 2

Title  Mr  Mrs  Ms  Miss Date of birth  /  /

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode  Country

Email

Relationship to investor(s)  % of Benefit  %

**Note:** Total proceeds must equal 100%.

If more than 2 beneficiaries are to be nominated please complete a second Plan Beneficiary Nomination Form.

## 4. Signature(s)

I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained for future reference.

### Investor 1 signature

Name of Investor 1

Date  /  /

### Investor 2 signature

Name of Investor 2

Date  /  /

PROMOTED AND DISTRIBUTED BY **CommonwealthBank**



### Return by post

(together with any identification documents where relevant)

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

### Contact us



Australian Unity  
114 Albert Road, South Melbourne VIC 3205



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

### Investor Services



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



1300 1300 38



1800 804 890

### Adviser Services



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



1300 133 285



1800 804 890