

Nomination of Beneficiary Form



Lifepan 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

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. Nomination of Beneficiaries including Wealth Preserver Feature (Optional)

If you wish to nominate a beneficiary, then you must also be the Life Insured. For joint applications, all joint investors must be the Lives Insured.

A beneficiary can be a natural person of any age, a company or a trust. A Wealth Preserver beneficiary must be a natural person. I/We nominate the following person(s) to receive the proceeds of any death benefit in the event of the death of the last surviving Life Insured, in accordance with my instructions specified below, the Product Disclosure Statement and 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.

Beneficiary 1

Title Mr Mrs Ms Miss Date of birth / /

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Relationship to investor(s) Portion of proceeds %

Wealth Preserver instructions for Beneficiary 1 (optional)

Do you wish to activate Wealth Preserver for this beneficiary? Yes No

If you have answered NO to the question above then please proceed to **Page 3**.

Annual Benefit Entitlement (for Beneficiary 1)

Pay my beneficiary the Annual Benefit Entitlement specified below:

1. A fixed dollar amount of \$ per annum, or
2. % of my/our beneficiary's Wealth Preserver investment balance per annum.
3. A lump sum payment of \$

Benefit Payment Commencement Date (for Beneficiary 1)

The benefit payments to your beneficiary will commence on the latter of the start date of your beneficiary's Wealth Preserver investment or on the date of your beneficiary's 16th birthday, unless you specify a later date.

Indicate below if you wish to specify a later benefit payment commencement date.

I/We authorise that benefit payments to my beneficiary are to commence on:

(e.g. "on my beneficiary's 21st birthday", "on the 10th anniversary of my death")

The benefit is to be payable into the Australian financial institution account maintained by my beneficiary every:

Fortnight Month Quarter Half-Year Year

Beneficiary 2

Title Mr Mrs Ms Miss Date of birth / /

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Relationship to investor(s) Portion of proceeds %

Wealth Preserver instructions for Beneficiary 2 (optional)

Do you wish to activate Wealth Preserver for this beneficiary? Yes No

If you have answered NO to the question above then please proceed to **Page 3**.

Annual Benefit Entitlement (for Beneficiary 2)

Pay my beneficiary the Annual Benefit Entitlement specified below:

- 1. A fixed dollar amount of \$ per annum, or
- 2. % of my/our beneficiary's Wealth Preserver investment balance per annum.
- 3. A lump sum payment of \$

Benefit Payment Commencement Date (for Beneficiary 2)

The benefit payments to your beneficiary will commence on the latter of the start date of your beneficiary's Wealth Preserver investment or on the date of your beneficiary's 16th birthday, unless you specify a later date.

Indicate below if you wish to specify a later benefit payment commencement date.

I/We authorise that benefit payments to my beneficiary are to commence on:

(e.g. "on my beneficiary's 21st birthday", "on the 10th anniversary of my death")

The benefit is to be payable into the Australian financial institution account maintained by my beneficiary every:

Fortnight Month Quarter Half-Year Year

Wealth Preserver declaration (only if the feature has been activated)

- The first benefit payment is due on the benefit commencement date (determined in accordance with my/our instructions above) and thereafter in accordance with the specified payment frequency.
- If the benefit payment commencement date is not a business day, benefit payments will commence on the next business day.
- Benefit payments are subject to the minimum's specified by us from time to time.
- The start date of my/our beneficiary's Wealth Preserver investment is the date when we transfer funds into the investment which will occur only after we have received official notification of the death of the last surviving Life Insured and after they have verified the eligibility of my/our nominated beneficiary.
- If the specified benefit payment commencement date is before the start date of my/our beneficiary's Wealth Preserver Investment or the date of my/our beneficiary's 16th birthday, the benefit payment commencement date will default to the later of these two dates.

3. Declaration and 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 references. Please retain a copy of this form for your files.

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 2

Date / /



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


Contact us


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 australianunity.com.au/wealth


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