

Plan Beneficiary Nomination Form



Lifepan Education 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

Student name

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

4. Signature(s)

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 2

Date / /

Student signature

Name of Student

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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