

Complete this form if a LifelIncome policyholder has died within their Death Benefit Period and there is no reversionary on the LifelIncome.

Generation Life will pay a lump sum Death Benefit to nominated beneficiaries. If no beneficiaries were nominated, the Death Benefit will be paid to the deceased's estate.

### Guide to completing this form

- All beneficiaries of the deceased investor must complete this form to receive a lump sum Death Benefit payment.
- To complete this process, please ensure the following documents are provided with this form:
  - Certified copy of death certificate
  - Certified copy of identification documents of each beneficiary
  - If any or all of the Death Benefit is to be paid to the deceased's estate, a certified copy of the Grant of Probate or Letters of Administration
- Please complete these instructions in BLACK/BLUE INK using CAPITAL LETTERS (except for email address).

## 1. Deceased investor details

Client number (if known):

Account number:

Investor name:

Date of birth:

(DD/MM/YYYY)

## 2. Beneficiary/estate details

Title:

Given name:

Surname:

Address: (PO BOX / RMB / LOCKED BAG IS NOT ACCEPTABLE)

Suburb/City/Town:

Postcode:

State:

Country:

Contact number:

Email address:

## 3. Payment instructions

Please provide your bank account details.

Bank and branch name:

Account name:

BSB:

Account number:

## 4. MCP Wholesale Investments Trust

The MCP Wholesale Investments Trust has limited liquidity which means that a Death Benefit based on an investment from this fund can only be paid at certain times. Where the investment allocation includes the MCP Wholesale Investments Trust, that respective portion of the Death Benefit may be paid separately.

If we receive this Death Benefit request by the 10th of a month, the redemption from the MCP Wholesale Investments Trust will be processed on the last Business Day of that month (except in June when it will be processed on the third last Business Day).

If this Death Benefit request is received after the 10th of a month, the redemption from the MCP Wholesale Investments Trust will be processed on the last Business Day of the following month (except in June when it will be processed on the third last Business Day).

The unit price received will be based on the date the redemption is processed.

## 5. Payment options

Please only complete this section if the LifeIncome policy includes investment in the MCP Wholesale Investments Trust.

Please indicate whether you would like to receive the Death Benefit in one or two payments:

I would like to receive one lump sum Death Benefit payment.

I understand that Generation Life will redeem all investments other than in the MCP Wholesale Investments Trust until a unit price is received for the MCP Wholesale Investments Trust. Investment in the MCP Wholesale Investments Trust will be redeemed as described in section 4. The lump sum Death Benefit payment may take up to 6 to 8 weeks to be processed.

OR

I would like to receive two lump sum Death Benefit payments.

I understand that Generation Life will redeem all investments other than in the MCP Wholesale Investments Trust and pay the first lump sum Death Benefit after the redemption is processed. The second lump sum Death Benefit will be paid after a unit price is received and the redemption is processed for the MCP Wholesale Investments Trust as described in section 4. The second lump sum Death Benefit payment may take up to 6 to 8 weeks to be processed.

## 6. Declaration and signature

I declare that all details in this form are true and correct.

I authorise Generation Life Limited to process the instructions set out in this form.

I release, discharge and agree to indemnify Generation Life Limited and any other related body corporate from and against any action, proceeding claims, losses, liabilities or costs arising from processing the instructions set out in this form.

If you are signing on behalf of a minor, you must be signing as their legal guardian.

### Signature of beneficiary or legal personal representative

Name (legal guardian if applicable): (PLEASE PRINT)

Signature:

Date:

(DD/MM/YYYY)

### You can submit this form by:

**Email:** enquiry@genlife.com.au

**Mail:** GPO Box 263, Collins Street  
West Melbourne VIC 8007