

Guide to completing this form

Use this form to transfer ownership of your LifeBuilder or ChildBuilder investment.

Transfer of ownership from the current owner to the new owner will occur on the transfer being registered by us. The registration of the transfer will revoke/cancel:

- all existing beneficiary nomination or future dated transfer instructions.
- the Adviser Representative facility or power of attorney nominated to act on behalf of the existing investor(s).
- all adviser service fee arrangements agreed between the current owner and the current financial adviser.
- the direct debit authorisation, Regular Savings Plan and Regular Withdrawal facility attached to the investment.
- Please use BLACK/BLOCK ink and complete the applicable sections in BLOCK LETTERS.

Transfer of ownership will not change the life insured(s). The existing life insured(s) will remain on the investment. You can add additional life insured(s) on a LifeBuilder investment by completing Section 6.

Residency status for tax purposes

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. For the United States of America (US), tax residency can be as a result of citizenship or residency.

FATCA and CRS are regulatory requirements that aim to deter tax evasion by US and other foreign taxpayers. The Australian and many other foreign governments have agreements through their tax offices where reporting financial institutions are required to collect and report to the Australian Taxation Office (ATO) certain information about the tax residency of account holders. The ATO shares this information with the tax authorities of other jurisdictions. For more information, visit www.ato.gov.au.

1. Existing investor details

Current Investor 1

Client number (if known)

Investor name (as held on the account)

Date of birth (dd/mm/yyyy) (if applicable)

Mobile number

Phone number

Email address

Current Investor 2 (if jointly owned)

Client number (if known)

Investor name (as held on the account)

Date of birth (dd/mm/yyyy) (if applicable)

Mobile number

Phone number

Email address

1.1 Applicable investments

These instructions are to apply to:

☐ all LifeBuilder and/or ChildBuilder investments held

OR

☐ the following investment bond(s) (please provide account number(s))

2. New investor details

To be completed by new owner(s).

☐ Individual(s). **Proceed to Section 3.**

☐ Company. **Proceed to Section 4.**

☐ Trust (including trusts with individual trustees, corporate trustees and deceased estates). **Proceed to Section 5.**

3. Individual and joint account holders

Required identification documents

Certified copies of the following identification documents are required for each individual.

- a current driver's licence (front and back) or passport (current or expired passport within the last 2 years)

OR

- a birth certificate **and**
- either a tax assessment (less than 12 months old), council rates notice or utilities provider account statement (less than 3 months old).

For other accepted forms of identification, please refer to the 'Completing proof of identity' document on our website.

If there are more than two joint holders, you will need to complete a separate form for the additional transferee.

3.1 Transferee 1 (must be at least 10 years old)

IMPORTANT: If aged from 10 to less than 16 years old then a parent or guardian must provide their consent by completing Section 3.2 below.

Personal details (all correspondence will be sent to this investor)

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Phone number

Mobile phone number

Email address

This email address may be used for investor correspondence.

Residential address

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to residential address)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Correspondence will be sent to your postal address.

Identification information

AML/CTF Laws require that we collect this information. Your instructions cannot be processed without this information.

Are you a Politically Exposed Person?

☐ Yes ☐ No

Residency status for tax purposes

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. Please refer to the 'Guide to completing this form' section at the start of this form for more information.

Are you a tax resident of Australia?

☐ Yes ☐ No

Are you a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, you will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

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3.2 Transferee 2 (must be at least 10 years old) or Parent/Guardian**Personal details**

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Phone number

Mobile phone number

Email address

This email address may be used for investor correspondence.

Residential address

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to residential address)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Identification information

AML/CTF Laws require that we collect this information. Your instructions cannot be processed without this information.

Are you a Politically Exposed Person?

☐ Yes ☐ No**Residency status for tax purposes**

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. Please refer to the 'Guide to completing this form' section at the start of this form for more information.

Are you a tax resident of Australia?

☐ Yes ☐ No

Are you a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, you will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

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3.3 Authority to operate the account - where joint transferees apply (select only one)

Please elect which joint transferees have authority to operate the account and bind the other joint investor(s) for future transactions (including additional investments, switches and withdrawals).

☐ All transferees (default) ☐ Transferee 1 ☐ Transferee 2 ☐ Either transferee

3.4 Sole trader (optional for individual account holders only)

Are you a sole trader?

☐ Yes ☐ No. **Please go to Section 6.**

If you are a sole trader you will need to provide the following additional details.

Business name (if applicable)

Australian Business Number (ABN)

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Business address (if different to residential address) (PO Box / RMB / Locked Bag is not accepted)

Suburb/City/Town

Postcode

State

Country

4. Company

NOTE: Not available for ChildBuilder investments.

Required identification documents

Certified copies of the following identification documents are required.

- a certificate of registration issued by ASIC

OR

- a current company search from the ASIC database
- **Certified copies of the following identification documents are required for each director and beneficial owner.**
- a current driver's licence (front and back) or passport (current or expired passport within the last 2 years)

OR

- a birth certificate **and**
- either a tax assessment (less than 12 months old), council rates notice or utilities provider account statement (less than 3 months old). For other accepted forms of identification, please refer to the 'Completing proof of identity' document on our website.

4.1 Company details

Full name of company

Australian Business Number (ABN) or Australian Company Number (ACN)

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Company contact person

Title

Given name(s)

Surname

Mobile number

Business telephone number

Email address

This email address may be used for investor correspondence.

Registered office

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to registered office)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Correspondence will be sent to your postal address.

4.2 Residency status for tax purposes

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. Please refer to the 'Guide to completing this form' section at the start of this form for more information.

Is the company a tax resident of Australia?

☐ Yes ☐ No

IMPORTANT: You will need to complete a separate FATCA/CRS Self-Certification Form if any of the following apply to the company. This form is available on our website.

Is the company a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

Is the company a U.S. Company, U.S. Trust or U.S. Partnership?

☐ Yes ☐ No

Is the company an Australian Financial Institution or Other Partner Jurisdiction Financial Institution?

☐ Yes ☐ No

4.3 Director details (proprietary companies only)

Is the company a proprietary/private company (i.e. a Pty Ltd company)?

☐ Yes. **Please continue below.** ☐ No. **Please go to section 6.**

If there are more than two directors please attach their details to this form.

Director 1 details

Title

Given name(s)

Surname

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the director a Politically Exposed Person?

☐ Yes ☐ No

Is the director a tax resident of Australia?

☐ Yes ☐ No

Is the director a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the director will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Director 2 details

Title

Given name(s)

Surname

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the director a Politically Exposed Person?

☐ Yes ☐ No

Is the director a tax resident of Australia?

☐ Yes ☐ No

► FORM CONTINUES OVER PAGE

Is the director a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the director will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

4.4 Beneficial Owners (proprietary companies only)

Please provide full name and address details of those persons who owns or controls 25% or more of the issued capital of the company.

If there are more than three beneficial owners please attach their details to this form.

Beneficial owner 1 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Beneficial owner 2 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Beneficial owner 3 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

5. Trusts (including corporate trustees, individual trustees and deceased estates)

Required identification documents

For trusts that do not have an ABN

- a certified copy of the trust deed or extracts of the trust deed showing the name of the trust, name and address of the settlor, amount of the initial settled sum, name(s) and address(es) of the trustee(s), the beneficiaries/unitholders, names/class(es) and the trust's execution page.

For individual Key Beneficial Owners of the Trust and individual trustees (including trustee of a deceased estate) certified copies of the following identification documents are required for each individual.

OR

- a birth certificate **and**
- either a tax assessment (less than 12 months old), council rates notice or utilities provider account statement (less than 3 months old).

For company Key Beneficial Owners and company trustees (including trustee of a deceased estate), please provide the identification documents in 'Required identification documents' in Section 4 - Company above.

For other accepted forms of identification, please refer to the 'Completing proof of identity' document on our website.

5.1 Trust details

Trust/Fund/Estate name

Business name (if applicable)

Australian Business Number (ABN) (if applicable)

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5.2 Type of trust

Please select the type of trust and provide the relevant information

- ☐ Family trust or discretionary trust
 ☐ Unit trust
 ☐ Foreign trust
 ☐ Testamentary trust (i.e. under a Will)

Other (please specify)

Residency status for tax purposes

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. Please refer to the 'Guide to completing this form' section at the start of this form for more information.

Is the trust a tax resident of Australia?

- ☐ Yes
 ☐ No

IMPORTANT: The trust will need to complete a separate FATCA/CRS Self-Certification Form if any of the following apply to the company. This form is available on our website.

Is the trust a tax resident of a country other than Australia or a Specified U.S Person?

- ☐ Yes
 ☐ No

Is the trust a U.S. Company, U.S. Trust or U.S. Partnership?

- ☐ Yes
 ☐ No

Is the trust an Australian Financial Institution or Other Partner Jurisdiction Financial Institution?

- ☐ Yes
 ☐ No

▶ FORM CONTINUES OVER PAGE

5.3 Trust beneficiaries

Does the trust deed name the beneficiaries?

☐ Yes ☐ No

If YES, please list their full names.

If there are more than four beneficiaries/unit holders, please provide details on a separate attachment to this form.

Beneficiary 1 full name (or entity name)

Are they Key Beneficial Owners?

☐ Yes ☐ No

Beneficiary 2 full name (or entity name)

Are they Key Beneficial Owners?

☐ Yes ☐ No

Beneficiary 3 full name (or entity name)

Are they Key Beneficial Owners?

☐ Yes ☐ No

Beneficiary 4 full name (or entity name)

Are they Key Beneficial Owners?

☐ Yes ☐ No

For any of the above trust beneficiaries/unit holders identified as being a Key Beneficial Owner, is that person(s) a Politically Exposed Person?

☐ Yes ☐ No

For any of the above trust beneficiaries/unit holders identified as being a Key Beneficial Owner, is that person(s) a tax resident of a country other than Australia or a Specified U.S Person? Please refer to the 'Guide to completing this form' section at the start of this form for more information.

☐ Yes ☐ No

If YES, each Key Beneficial Owner who is a tax resident of a country other than Australia or a Specified U.S Person will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

If the trust identifies its beneficiaries/unit holders by specified classes and/or by names and specified classes, please list the class below and also the beneficiaries named (if any) within specified classes:

1.

2.

5.4 Trust settlor details

If the initial settled sum to establish the trust is \$10,000 or more, please provide name and address of the settlor(s) of the trust.

A settlor is the person or entity that subscribes for or settles the initial sum to create the trust.

Name of settlor

Address of settlor

Suburb/City/Town

Postcode

State

Country

5.5 Type of trustee

Are you an individual trustee? (including trustee of a deceased estate)

☐

Yes. **Continue to Section 5.6.**

☐

No. **Proceed to Section 5.7.**

5.6 Individual trustee(s)**Trustee details****Trustee 1**

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Mobile number

Phone number

Email address

This email address may be used for investor correspondence.

Residential address

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to residential address)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Correspondence will be sent to your postal address.

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the trustee a Politically Exposed Person?

☐ Yes ☐ No

Is the trustee a tax resident of Australia?

☐ Yes ☐ No

Is the trustee a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the trustee will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Trustee 2

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Mobile number

Phone number

Email address

This email address may be used for investor correspondence.

Residential address

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to residential address)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Correspondence will be sent to your postal address.

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the trustee a Politically Exposed Person?

☐ Yes ☐ No

Is the trustee a tax resident of Australia?

☐ Yes ☐ No

Is the trustee a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the trustee will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

5.7 Company as trustee

If there are more corporate trustees, repeat those details for each additional trustee and write the full name and address of each trustee down on a piece of paper and attach to this form.

Full name of company

Australian Business Number (ABN) or Australian Company Number (ACN)

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Company contact person

Title

Given name(s)

Surname

Mobile number

Business number

Email address

This email address may be used for investor correspondence.

Registered office

Address (PO Box / RMB / Locked Bag is not acceptable)

Suburb/City/Town

Postcode

State

Country

Postal address (if different to registered office)

(C/- if applicable)

Address

Suburb/City/Town

Postcode

State

Country

Correspondence will be sent to your postal address.

Residency status for tax purposes

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) laws, we are required to ask all investors to provide additional information about their tax residency. Please refer to the 'Guide to completing this form' section at the start of this form for more information.

Is the company a tax resident of Australia?

☐

Yes

☐

No

IMPORTANT: You will need to complete a separate FATCA/CRS Self-Certification Form if any of the following apply to the company. This form is available on our website.

Is the company a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

Is the company a U.S. Company, U.S. Trust or U.S. Partnership?

☐ Yes ☐ No

Is the company an Australian Financial Institution or Other Partner Jurisdiction Financial Institution?

☐ Yes ☐ No

Director details (proprietary companies only)

Is the company a proprietary/private company (i.e. a Pty Ltd company)?

☐ Yes. **Please continue below.** ☐ No. **Please go to section 6.**

If there are more than two directors please attach their details to this form.

Director 1 details

Title

Given name(s)

Surname

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the director a Politically Exposed Person?

☐ Yes ☐ No

Is the director a tax resident of Australia?

☐ Yes ☐ No

Is the director a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the director will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Director 2 details

Title

Given name(s)

Surname

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the director a Politically Exposed Person?

☐ Yes ☐ No

Is the director a tax resident of Australia?

☐ Yes ☐ No

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Is the director a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the director will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Beneficial Owners

To be completed by proprietary companies only.

Please provide full name and address details of those persons who owns or controls 25% or more of the issued capital of the company.

If there are more than three beneficial owners please attach their details to this form.

Beneficial owner 1 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Beneficial owner 2 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

► FORM CONTINUES OVER PAGE

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

Beneficial owner 3 details

Title

Given name(s)

Surname

Address

Suburb/City/Town

Postcode

State

Country

Politically Exposed Person and residency status for tax purposes (Please refer to the 'Guide to completing this form' section at the start of this form for more information)

Is the beneficial owner a Politically Exposed Person?

☐ Yes ☐ No

Is the beneficial owner a tax resident of Australia?

☐ Yes ☐ No

Is the beneficial owner a tax resident of a country other than Australia or a Specified U.S Person?

☐ Yes ☐ No

If YES, the beneficial owner will need to complete a separate FATCA/CRS Self-Certification Form available on our website.

6. Life Insured

The existing life insured(s) will remain registered on the account.

If the transfer relates to a ChildBuilder account, then the life insured (child) cannot be changed or added to.

Is this a transfer of a LifeBuilder investment?

☐ Yes. Please continue below. ☐ No. Proceed to Section 7.

6.1 Investor(s) as the life insured

Do you want the new investors named in Section 3 to be the life/(joint lives) insured?

☐ Yes (default). Each new investor will be registered as the life/ lives insured.
☐ No. Please provide additional life insured details below.

6.2 Life insured details

If there are more than two additional lives insured please attach their details to this form.

Life insured 1 (if different to individual investors and for new company or trust owners)

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Residential address (PO Box / RMB / Locked Bag is not accepted)

Suburb/City/Town

Postcode

State

Country

Life insured 2 (if required)

Title

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

 / /

Occupation

Residential address (PO Box / RMB / Locked Bag is not accepted)

Suburb/City/Town

Postcode

State

Country

► FORM CONTINUES OVER PAGE

7. New investor declaration and signature(s)

I/We confirm that I/We have received a copy of the current Product Disclosure Statement (PDS) and have read and understood the PDS and agree to be bound by the terms and conditions set out in the PDS.

New Investor 1

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director ☐ Power of attorney

Name (please print)

Signature

Date (dd/mm/yyyy)

 / /

New Investor 2

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director / Company secretary ☐ Power of attorney ☐ Parent / Guardian

Name (please print)

Signature

Date (dd/mm/yyyy)

 / /

If signed under a power of attorney, the attorney certifies that he/she has not received notice of revocation of that power.

If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the AML/CTF Laws.

For more information, please refer to the 'Completing proof of identity' document on our website.

8. Existing investor declaration and signature(s)

I/we being the investment owner(s) named above confirm that I/we am/are the legal and beneficial owner(s) of the above investment(s) and that I/we have not transferred, assigned, mortgaged or charged the investment(s), or any rights or interests under the investment(s). I/we transfer my/our rights, powers and interest in the above investment(s) to the person(s) named above as the Transferee(s), and further acknowledge that any beneficiary nomination or Future Event transfer that I/we have made will be revoked and cancelled.

Existing investor 1

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director ☐ Power of attorney

Name (please print)

Signature

Date (dd/mm/yyyy)

 / /

Existing investor 2

Please select the appropriate box

☐ Individual ☐ Trustee ☐ Director / Company secretary ☐ Power of attorney ☐ Parent / Guardian

Name (please print)

Signature

Date (dd/mm/yyyy)

 / /

If signed under a power of attorney, the attorney certifies that he/she has not received notice of revocation of that power.

If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the AML/CTF Laws.

For more information, please refer to the 'Completing proof of identity' document on our website.

You can submit this form by:

Email: enquiry@genlife.com.au

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