

Change of details

Investment Growth Bond

Important information

This form may be posted to: **Resolution Life, GPO Box 3306, Sydney NSW 2001**

Contact phone number: **133 731** between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.

Please note:

- **This form should be used for policies opened prior to 18 March 2013.**
- Please write in block letters and use a black ballpoint pen.
- Fields marked with an asterisk (*) must be completed for the purpose of any-money laundering and counter-terrorism financing laws and the Foreign Account Tax Compliance Act (FATCA).

Section 1 – New personal or company details (applicant)

Please note: Complete this section for change of name or contact details. If your name has changed, please attach a copy certified by a justice of the peace, solicitor or notary public of the documentation by which you registered your change of name, such as a marriage certificate, deed poll or decree nisi (in the event of divorce).

Policy number

Bond owner 1

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)* Surname* Date of birth (dd/mm/yyyy)*

Other names known by (if any) **or** Full Company/Business Trust name

Residential/Business address (PO Box is not acceptable)*

<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
State	Postcode	Country	

Postal address

<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
State	Postcode	Country	

Mobile number

Alternate phone number

Email address

Bond owner 2

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)* Surname* Date of birth (dd/mm/yyyy)*

Other names known by (if any) **or** Full Company/Business Trust name

Residential/Business address (PO Box is not acceptable)*

<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
State	Postcode	Country	

Section 1 – New personal or company details (applicant) (continued)

Postal address

State	Postcode	Country

Mobile number

Alternate phone number

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Email address

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Section 2 – New automatic withdrawal facility details (available to investment of at least \$10,000)

Please note:

- Please complete the banking details to enable funds to be deposited into an account.
- We will not pay automatic regular withdrawals by cheque.

Please nominate the Investment option for the automatic withdrawal.

- ☐ Tick this box to indicate that you wish the automatic withdrawal to deduct from the next available investment option. If there are insufficient funds available the automatic withdrawal facility will cease.

Investment option	Amount of each payment (minimum \$500 per option)
	\$
	\$
	\$

Frequency (please indicate (✓))

- ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

Please note: If an Investment option is not nominated the automatic withdrawal will be deducted on a pro-rata basis.

Account name (must be in the name of the bond owner(s))

BSB number

Account number

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First withdrawal date
(dd/mm/yyyy)

Last withdrawal date
(if required) (dd/mm/yyyy)

Rate of increase in payments

		Nil <input type="checkbox"/> <input type="text"/> % each year
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Section 3 – Switching Investment Options (funds)

Please note: Please complete the amount you wish to switch in the 'Switch from' and 'Switch to' columns. Ensure the totals of each column are equal. **The minimum switch is \$200 per Fund.**

Investment option	Switch from	Switch to
Conservative 10 (3STB)	\$	\$
Growth 15 (3MGD)	\$	\$
Capital Guaranteed Cash (3CSH)	\$	\$
Diversified Fixed Interest 3 (3FIX)	\$	\$
Listed Real Assets (3PRP)	\$	\$
Australian Share 14 (3EQY)	\$	\$
International Share 8 (3INT)	\$	\$
Total	\$	\$

Section 4 – Additional contributions

Please note: Minimum is \$200 per Fund. The minimum initial investment is \$1,000. Cash deposits will not be accepted.

Investment option	Amount
Conservative 10 (3STB)	\$
Growth 15 (3MGD)	\$
Capital Guaranteed Cash (3CSH)	\$
Diversified Fixed Interest 3 (3FIX)	\$
Listed Real Assets (3PRP)	\$
Australian Share 14 (3EQY)	\$
International Share 8 (3INT)	\$

Please indicate (✓) how will you be paying:

☐ Cheque (please attach with this form)

☐ BPAY® (please refer to the BPAY® section in your PDS before selecting this option)

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Section 5 – Declaration and acknowledgment (this section must be completed in all circumstances.)

By signing this form I/we declare as follows:

- I/we believe that I/we have obtained all information sufficient to explain the investment objectives, the risk and effect of each investment option chosen.
- If this form is signed under a Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with the form).

Bond owner's signature

X

Date (dd/mm/yyyy)

Joint bond owner's signature (if any)

X

Date (dd/mm/yyyy)

If investor is a company, then this must be signed by an authorised officer (e.g. Director, Company Secretary).

What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of Investment Growth Bond. The information contained in this document is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you. Any guarantee offered in this product is only provided by Resolution Life. Resolution Life can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.