

Withdrawal request 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.

Use this form for policies that commenced **POST 1 July 2023**.

Section 1 – Bond Owner details (all details must be completed)

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 address (PO Box is not acceptable)

State Postcode Country

Postal address

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 address (PO Box is not acceptable)

State Postcode Country

Postal address

State Postcode Country

Mobile number

Alternate phone number

Email address

Section 2 – Withdrawal amount

Please tick (✓) for type of withdrawal:

Partial withdrawal (minimum balance to remain in any fund is \$200) Full withdrawal

Please indicate the amount as either dollar (\$) OR percentage (%) of monies to be withdrawn from each investment option. Minimum withdrawal is \$1,000.

Investment option	Amount	Percentage
	\$	%
	\$	%

Section 3 – Payment details

Please note: direct credit is not available on credit card accounts.

Credit the following bank account (funds can only be credited to an Australian bank account)

Account name (must be in the name of the Bond owner(s))	BSB number	Account number
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Section 4 – Policy schedule

Please note: for a full withdrawal, you'll need to return your policy schedule to us. In the event of your policy schedule being lost, please complete the declaration in **section 6**.

I enclosed the original policy schedule

Section 5 – Identification requirements

What the certifier needs to do to certify your photocopied ID

The certifier can certify the photocopy of your ID by placing a stamp or writing 'This is a true and correct copy of the original' followed by their signature, printed name, qualification and the date. For example:

Persons who can certify documents

A person who is currently licensed or registered under a law to practise in Australia in one of the following occupations:

- | | |
|---|---|
| <ul style="list-style-type: none"> Architect Chiropractor Dentist Financial adviser or financial planner Legal practitioner Medical practitioner Midwife Migration agent registered under Division 3 of Part 3 of the Migration Act 1958, or similar legislation in a foreign country | <ul style="list-style-type: none"> Nurse Occupational therapist Optometrist Patent attorney Pharmacist Physiotherapist Psychologist Trademarks attorney Veterinary surgeon |
|---|---|



This is a true and correct copy of the original.
John Clarke
 JOHN CLARKE - Justice of the Peace - 01.08.19

Section 5 – Identification requirements (continued)

A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described);

An officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more years of continuous service with one or more licensees;

An officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees; or a person who is in the following list:

- Accountant who is:
 - (a) a fellow of the National Tax Accountants' Association; or
 - (b) a member of any of the following:
 - (i) Chartered Accountants Australia and New Zealand;
 - (ii) the Association of Taxation and Management Accountants;
 - (iii) CPA Australia;
 - (iv) the Institute of Public Accountants
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- APS employee engaged on an ongoing basis with two or more years of continuous service who is not specified in another item in this list
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the **Consular Fees Act 1955**).
- Bailiff
- Bank officer with two or more continuous years of service
- Building society officer with two or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with two or more years of continuous service
- Employee of a Commonwealth authority engaged on a permanent basis with two or more years of continuous service who is not specified in another item in this list
- Employee of the Australian Trade and Investments Commission who is:
 - (a) in a country or place outside Australia and
 - (b) authorised under paragraph 3(c) of the **Consular Fees Act 1955**; and
 - (c) exercising the employee's function in that place
- Employee of the Commonwealth who is:
 - (a) at a place outside Australia; and
 - (b) authorised under paragraph 3 (d) of the **Consular Fees Act 1955**; and
 - (c) exercising the employee's function in that place
- Engineer who is:
 - (a) a member of Engineers Australia, other than at the grade of student; or
 - (b) a Registered Professional Engineer of Professionals Australia; or
 - (c) registered as an engineer under a law of the Commonwealth, a State or Territory; or
 - (d) registered on the National Engineering Register by Engineers Australia
- Finance company officer with two or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the **Marriage Act 1961**
- Master of a court
- Member of the Australian Defence Force who is:
 - (a) an officer; or
 - (b) a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with five or more years of continuous service; or
 - (c) a warrant officer within the meaning of that Act
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Governance Institute of Australia Ltd
- Member of:
 - (a) the Parliament of the Commonwealth or
 - (b) the Parliament of a State or
 - (c) a Territory legislature or
 - (d) a local government authority
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the **Marriage Act 1961**
- Notary public, including a notary public (however described) exercising functions at a place outside:
 - (a) the Commonwealth; and
 - (b) the external Territories of the Commonwealth
- Permanent employee of the Australian Postal Corporation with five or more years of continuous service who is employed in an office providing postal services to the public
- Permanent employee of:
 - (a) a State or Territory or a State or Territory authority; or
 - (b) a local government authority; with two or more years of continuous service other than such an employee who is specified in another item in this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive employee of a Commonwealth authority
- Senior Executive employee of a State or Territory
- SES employee of the Commonwealth
- Sheriff
- Sheriff's officer
- Teacher employed on a permanent full-time or part-time basis at a school or tertiary education institution.

Section 6 – Declaration and acknowledgment

Please note: please ensure that you have attached a certified copy of your driver licence or passport as specified in **section 5**.

By signing this request form I declare as follows:

- All answers given on this form are true and correct.
- I indemnify Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) - against any liabilities whatsoever arising out of it acting on any of these details provided by me in connection with this form.
- I understand that once my withdrawal is finalised it will not be reversed.
- By signing this form I declare that I have read and understood the Product Disclosure Statement.
- 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).

Please indicate in the tick (✓) box below if you have lost your policy schedule.

I/We confirm that I/we have lost the Policy Schedule and declare:

- The policy owner(s) is/are the legal owner(s) of the above named policy.
- The policy is not currently the subject of an assignment, transfer, charge or lien and the policy owner(s) has/have not in any way parted with their interest in it.
- I/We have made a thorough search for the policy schedule and they cannot be found.

Bond owner's signature

Date (dd/mm/yyyy)

Joint bond owner's signature (if any)

Date (dd/mm/yyyy)

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 is part of the Resolution Life Group and can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.