

Authority to change your servicing adviser

Use this form to authorise Resolution Life to transfer your plan(s) or policy(ies) to a new servicing adviser.

For corporate super plans:

- you must attach a letter from the authorising officer (on company letterhead) confirming the transfer of the plan.
- you may not be able to change the servicing adviser for your account or be assigned to a different adviser due to an adviser already being allocated to your employer plan. Please contact your Human Resources area to understand who the servicing adviser is for your employer plan.

! We'll process the authority to transfer your plan(s) or policy(ies) to your new adviser once we've received this completed form.
Note: We won't be able to process your authority if we receive this completed form 60 days after it's been signed.

Any alterations that you make to this form after it's been signed **must** be initialled by you (the policy owner/authorised trustee). Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

1. Plans or policies to be transferred

I'd like to transfer (cross **one** only):

- All my plans or policies to the adviser nominated in section 3:
 Only the following plan(s) or policy(ies) to the adviser nominated in section 3:

Plan/policy number 1

Plan/policy number 2

Plan/policy number 3

Plan/policy number 4

Plan/policy number 5

Plan/policy number 6

Plan/policy number 7

Plan/policy number 8

For policy owned by an SMSF, provide the trustee name and or SMSF name and policy number in Section 2 below

2. Policy owner/authorised trustee details

Policy owner/authorised trustee 1

Title

Date of birth

Surname

Given name(s)

Gender

Male Female

Residential address

Suburb

State

Postcode

Contact phone number

Mobile number

Email address

2. Policy owner/authorised trustee details (continued)

Policy owner/authorised trustee 2

Title

Date of birth

Surname

Given name(s)

Gender

Male Female

Please cross if the address is the same as policy owner/authorised trustee 1

Residential address

Suburb

State

Postcode

Contact phone number

Mobile number

Email address

3. New adviser details

We can only process the transfer of your new servicing adviser if your new adviser has been allocated adviser identification numbers.

Code 1 eg 265789	Used for Resolution Elevate, products
Code 2 eg NPDEG-A	Used for Flexible Lifetime® – Protection, Matured & Conventional products

To obtain a new adviser code, please follow this link to the relevant form: [Financial Adviser Code Request](#)

Please provide the code (ie new adviser ID numbers), where applicable below:

Adviser ID (code 1)

eg 265789

Adviser ID (code 2)

eg NPDEG-A

Adviser given name(s)

Adviser surname

Practice name

Adviser Email Address

Licensee Name

4. Authorisation and signature

By signing this authority to change my/our servicing adviser, I/we have read and understood the following:

Existing adviser

The existing adviser will no longer:

- be remunerated for the plan(s) or policy(ies) listed in this form following this decision,
- have access to information on my/our plan(s) or policy(ies), and
- be responsible for reviewing my/our ongoing needs.

New adviser

The new adviser and their licensee will:

- have access to information on my/our plan(s) or policy(ies),
- be responsible for providing me/us with ongoing advice relating to the plan(s) or policy(ies) listed in this form, and
- be remunerated for the plan(s) or policy(ies) listed in this form after the transfer is processed.

Please note that Resolution Life accept wet signatures and all electronically signed through e-signature system.

Policy owner/authorised trustee 1 name

Policy owner/authorised trustee 1 signature

X

Date

D D M M Y Y Y Y

Policy owner/authorised trustee 2 name

Policy owner/authorised trustee 2 signature

X

Date

D D M M Y Y Y Y

Where to send this form

Email this completed form to:

adviserregisters@resolutionlife.com.au

Any questions?
133 731

5. Checklist

Have you:

- completed all relevant sections of this form?
- attached a letter from the authorising officer (on company letterhead) confirming the adviser transfer (if applicable)?
- signed and dated the form where indicated?