

# **Annuities** **MyQuote and MyApply**

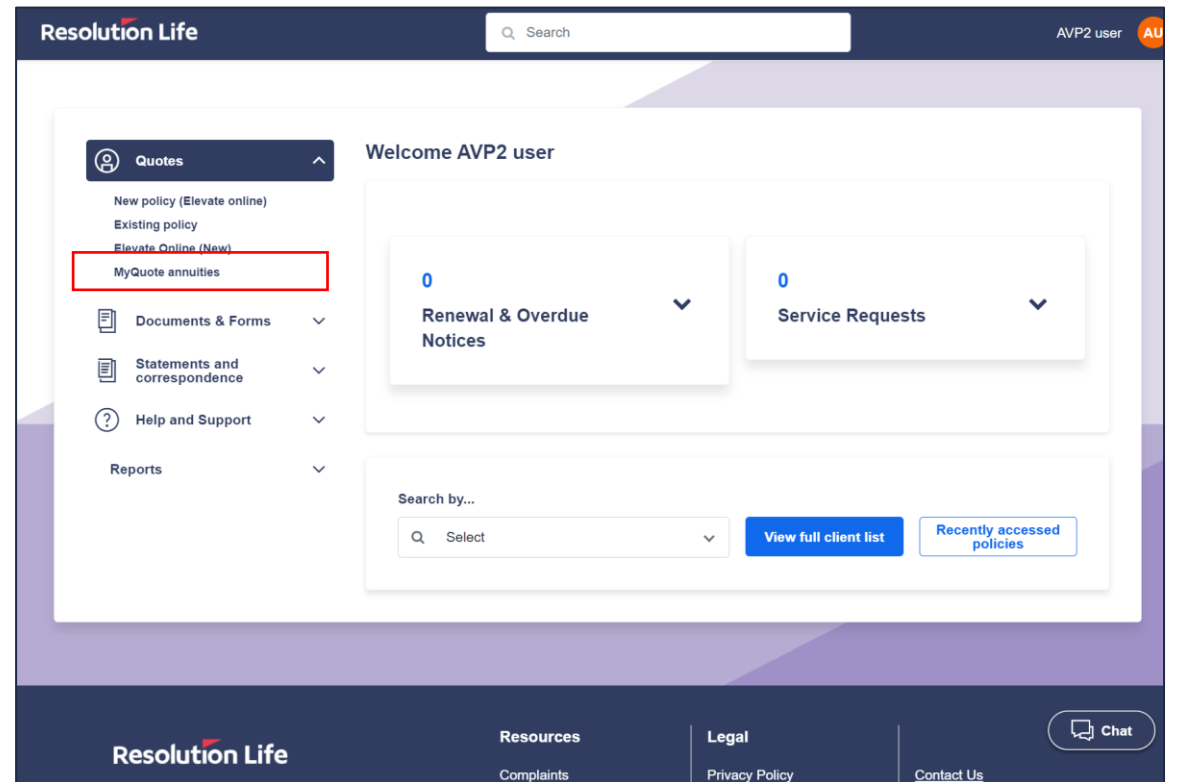
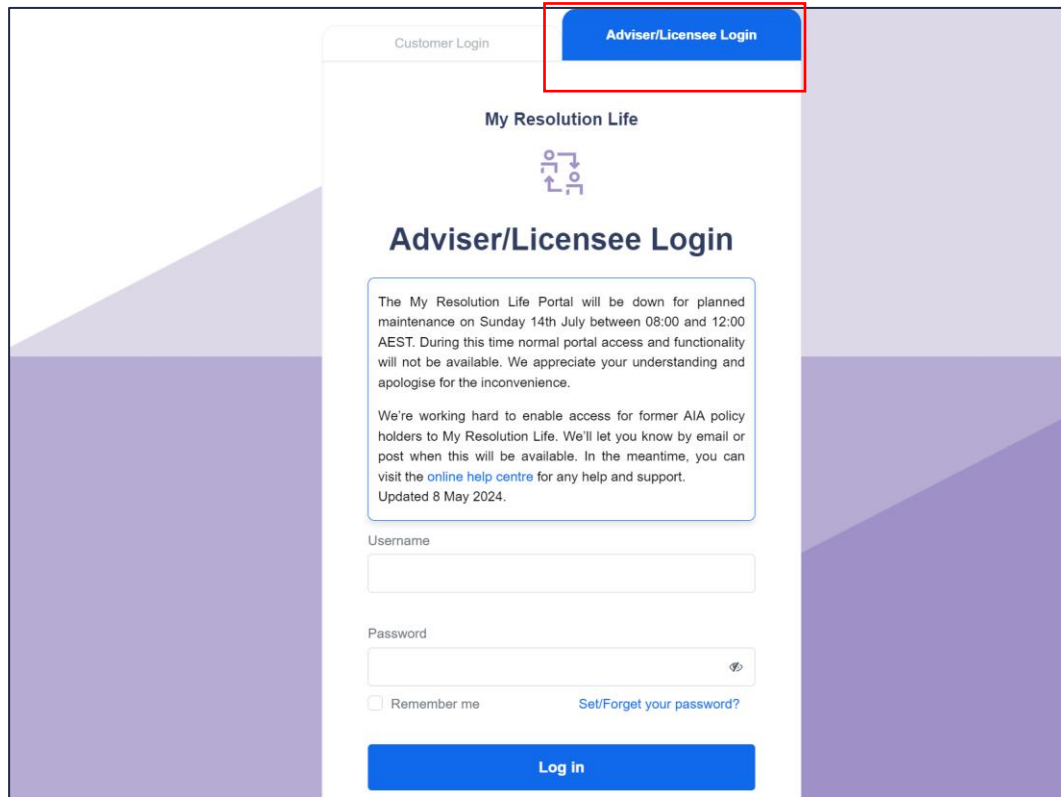
*4 August 2024*

*Adviser use only*

# My Resolution Life portal

Login screen- adviser

[NewLoginRLANZ \(resolutionlife.com.au\)](https://resolutionlife.com.au)



# MyQuote annuities

*Adviser Quote screen where you enter the customer details*

Resolution Life MyQuote Saved quotes AVP2 user

← Back to adviser dashboard

MyQuote annuities  
New quote

Sales ID 41607 AvP **New AvP field to generate AvP quote**

Quote ID  
Quote date 26/07/2024

Investor details

Ownership: Individual, Joint, Individual with Reversionary, Company, Trust or Superfund, Super fund

First name, Last name, Gender (Select)

Date of birth (dd/mm/yyyy), Age

Investment

Total investment: \$10,000  
Upfront ASF: \$0.00 OR 0.00 %  
Ongoing ASF: \$0.00  
Frequency: Monthly

Super: No  
Tax free amount: \$0.00  
Untaxed amount: \$0.00

Net total investment: \$10,000

Product

Type of investment

Short Term Income Long Term Income Lifetime Income - Immediate Lifetime Income - Deferred

Purchase price \$10,000 Term 1 year Indexation option Nil RCV \$10,000 100%

Calculate

# MyQuote annuities

*The rate applied and income payment are calculated once you click 'Calculate'*

MyQuote annuities Start new quote

**New quote**

Sales ID 41607 AvP

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**Investor details**

**Ownership**

Individual  Joint  Individual with Reversionary  Company, Trust or SuperFund  Super fund

**First name \***  **Last name \***  **Gender \***

**Date of birth \***  **Age**

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**Investment**

Quote ID: 00000615  
Quote date: 26/07/2024

**Product result**

Annual income pre-tax	\$461.00
Guaranteed yield	4.71%

**Frequency**

Income payment	\$38.42
Projected yield	4.71%

# Additional features in the dropdown “More” menu

*You can save, download and email the quote.*

The screenshot shows a user interface with a 'More...' button and an 'Apply now >' button. The 'More...' dropdown menu is open, displaying the following options with corresponding icons:

- New scenario (Icon: Document with lines)
- Save (Icon: Floppy disk)
- Download quote (Icon: Downward arrow)
- Email quote (Icon: Envelope)
- Add a note (Icon: Speech bubble)
- View income projection (Icon: Bar chart with dollar sign)

The screenshot shows a form titled 'Email quote'. It contains a text input field with the placeholder text 'Enter the address you'd like to email a copy of your quote to \*'. Below the input field are two buttons: 'Cancel' and 'Send'.

The screenshot shows a table titled 'Income projection' with a close button (X) in the top right corner. The table has the following data:

After year	Gross income	Deductible amount	Assessable amount
1	\$461.00	\$0.00	\$461.00
<b>Total at the end of term</b>	<b>\$461.00</b>	<b>\$0.00</b>	<b>\$461.00</b>

Quote PDF output contains the key features of the customer's annuity policy, including the rate.

### Quote

Guaranteed Annuities Lifestream Guaranteed Income

Personal details	Quote details
<b>Name:</b> John Smith	<b>Quote ID:</b> 00000615
<b>Date of birth:</b> 01/01/1945	<b>Quote date:</b> 26/07/2024
<b>Age:</b> 79	<b>Date prepared:</b> 26/07/2024
<b>Gender:</b> Male	<b>Valid until:</b> 08/08/2024

Adviser details	
<b>Prepared by:</b> HMLUFM NBTTT	<b>Phone:</b> 074639450888
<b>Email:</b> hmlup@hgfmgjyvtamlifh.zbs.mo	<b>On behalf of:</b> S&I Products GPO Box 3306, Sydney NSW 2001

Investment details	
<b>Total investment:</b> \$10,000.00	<b>Payment frequency:</b> Monthly
<b>Upfront adviser service fee:</b> \$0.00	<b>Ongoing adviser service fee:</b> \$0.00 / Monthly
<b>Ownership:</b> Individual	<b>Investment source:</b> Personal Savings

Short Term Income	
<b>Term:</b> 1 year	<b>Bonus rate:</b> 0.00%
<b>Purchase price:</b> \$10,000.00	<b>Nominal yield:</b> 4.61%
<b>RCV:</b> \$10,000.00 (100%)	<b>Effective rate:</b> 4.71%
<b>Indexation:</b> Nil	<b>Projected yield:</b> 4.71%

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671.  
Quote date 26/07/2024      Quote ID 00000615      Page 1 of 7

Please refer to the 'Important Notes' (in the following section) that also includes information on the assumption used to calculate the regular payments in this quote.

### First year income details

	Gross monthly payment *	Gross yearly payment *
Short Term Income	\$38.42	\$461.00
<b>Total per policy</b>	<b>\$38.42</b>	<b>\$461.00</b>

\* The gross regular payment and gross yearly payment do not take account of any ongoing adviser service fee that may be payable (if any) to your adviser.


### Income projection

After year	Gross income	Deductible amount	Assessable amount
1	\$461.00	\$0.00	\$461.00
<b>Total at the end of term</b>	<b>\$461.00</b>	<b>\$0.00</b>	<b>\$461.00</b>

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671.  
Quote date 26/07/2024      Quote ID 00000615      Page 2 of 7

# Continuing to the application form

*Click to continue to the application form*

 **You are progressing the quote to an application**

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Please carefully check the details you have entered into **My Quote**, including any adviser service fees, as these will form part of the application. If you wish to amend any of the **My Quote** details after clicking **Continue to application** you will need to prepare a new quote and application.

Before completing this application form, please ensure the client has read the latest Product Disclosure Statement for this product available at [resolutionlife.com.au/adviser/annuities](https://resolutionlife.com.au/adviser/annuities). The PDS will help the client to understand the product and decide whether it's appropriate for their needs.

The application form consists of two parts, Part A for Individuals and Part B for Australian companies, trusts or super funds. As you are completing Part A, you acknowledge that you have chosen not to complete Part B of the application form.

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[Return to quote](#) [Continue to application >](#)

# MyApply – annuities online application

## 1. Type of Investment

The screenshot shows the Resolution Life MyApply online application interface. At the top, the Resolution Life logo is on the left, and 'MyQuote' and 'Saved quotes' are in the center. On the right, there is a user profile icon labeled 'AVP2 user'. Below the header, the text 'MyQuote annuities' is followed by 'Application - John Smith 00000615 - Incomplete Application' and a 'Start new quote' button. A progress bar with 12 steps is shown, with step 1 'Type of investment' highlighted. The main form area is titled '1 Type of Investment' and contains three sections: 'Investment type' with 'Short Term Income' selected, 'Reinvestment' with a toggle switch turned off, and 'Existing policy number' with an empty input field. At the bottom, there are 'Back to quote', 'Save', and 'Next >' buttons.

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities  
**Application - John Smith 00000615 - Incomplete Application** Start new quote

1 2 3 4 5 6 7 8 9 10 11 12  
Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN declaration Complete application

**1 Type of Investment**

Investment type Reinvestment Existing policy number  
Short Term Income

Back to quote Save Next >



# MyApply – annuities online application

## 2. Investor details

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities  
**Application - John Smith 00000615 - Incomplete Application** [Start new quote](#)

1 2 3 4 5 6 7 8 9 10 11 12  
Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN Complete application

**2a Investor 1 details (Applicant for Policy Owner)**

**Title \*** **First name** **Last Name**  
Select [v] [ ] John [ ] Smith [ ]

**Date of birth** **Gender** **Occupation and position title (specify if "retired") \***  
01/01/1945 [ ] Male [v] [ ]

**Home address (P.O. Box is not acceptable)**  
**Address location \***  
[ ] [v]

[I can't find my address or live overseas](#)

# MyApply – annuities online application

## 2. Investor details

**Home address (P.O. Box is not acceptable)**

Address location \* New address lookup field

[I can't find my address or live overseas](#)

**Postal address**

Postal address is the same as home address

**Address location**

[I can't find my address or live overseas](#)

**Contact Details**

<b>Mobile number</b>	<b>Alternative phone number</b>	<b>Email address</b>
<input type="text" value="🇺🇦 (+61) v"/>	<input type="text"/>	<input type="text"/>

Back to quote

< Back

Save

Next >

# MyApply – annuities online application

## 3. Tax residency details

1 Type of investment   2 Investor details   3 Tax residency   4 Investment details   5 Payment details   6 Beneficiary details   7 ID verification   8 Adviser Service Fee   9 Declaration   10 Adviser   11 TFN declaration   12 Complete application

### 3a Tax residency – Investor 1 (Personal savings only)

Is the individual a tax resident of Australia?

Is the individual a tax resident of another country?

**i** As the individual is a tax resident of a country other than Australia, or a dual citizen of Australia and another country, please provide their tax identification number (TIN) or equivalent below. If they are a tax resident of more than one other country, please list all relevant countries.

A TIN is the number assigned by each country for the purposes of administering tax laws. This is the equivalent of a Tax File Number in Australia or a Social Security Number in the US. If a TIN is not provided, please select one of the reasons for not providing a TIN.

Country	TIN	Reason unable to provide
Please select <input type="text"/>	<input type="text"/>	Please select <input type="text"/>

**New Country lookup field** + Add tax residency

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)

# MyApply – annuities online application

## 4. Investment details

The screenshot displays the Resolution Life MyApply online application interface. At the top, the Resolution Life logo is on the left, and 'MyQuote' and 'Saved quotes' are in the center. On the right, there is a user profile icon labeled 'AVP2 user'. Below the navigation bar, the page title is 'MyQuote annuities Application - John Smith 00000615 - Incomplete Application'. A 'Start new quote' button is located in the top right corner. A progress bar below the title shows 12 steps: 1. Type of investment, 2. Investor details, 3. Tax residency, 4. Investment details (current step), 5. Payment details, 6. Beneficiary details, 7. ID verification, 8. Adviser Service Fee, 9. Declaration, 10. Adviser, 11. TFN declaration, and 12. Complete application. The 'Investment details' section is active and contains the following fields: 'Purchase price' with a value of '\$10,000', 'Investment' type set to 'Personal Savings', 'Source of funds for personal savings' set to 'Savings', and 'Source of Wealth' set to 'Income'. Below these, 'Investment will be made by' is set to 'Direct deposit', and account information is provided: 'Account Name: RESOLUTION LIFE AUSTRALASIA LIMITED', 'BSB: 032021', and 'Account number: 103312'. The 'Short Term Income' section shows 'Short term of' as '1 year', 'RCV' as '\$10,000', and 'Automatic Reinvestment of the RCV at maturity' as a toggle switch. At the bottom, there are buttons for 'Back to quote', '< Back', 'Save', and 'Next >'.

# MyApply – annuities online application

## 5. Payment details

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities  
**Application - John Smith 00000615 - Incomplete Application** [Start new quote](#)

1 2 3 4 5 6 7 8 9 10 11 12  
Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN Complete application

**5a Payment details – Investor 1**

**Payment frequency \***  
Monthly

Please provide details of your account you want your regular payments to be credited to. The account name must be in the name of the investor.

<b>Name of Australian financial institution *</b>	<b>Account Name *</b>	<b>Branch Number (BSB) *</b>	<b>Account Number *</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Must be in the name of the investor

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)

# MyApply – annuities online application

## 6. Beneficiary details

The screenshot displays the Resolution Life MyQuote application interface. At the top, the Resolution Life logo is on the left, and 'MyQuote' and 'Saved quotes' are in the center. On the right, a user profile icon is labeled 'AVP2 user'. Below the navigation bar, the text 'MyQuote annuities' is followed by the application title 'Application - John Smith 00000615 - Incomplete Application' and a 'Start new quote' button. A progress bar shows 12 steps: 1. Type of investment, 2. Investor details, 3. Tax residency, 4. Investment details, 5. Payment details, 6. Beneficiary details (highlighted), 7. ID verification, 8. Adviser Service Fee, 9. Declaration, 10. Adviser, 11. TFN declaration, and 12. Complete application. The 'Beneficiary details' section is expanded, showing a 'Nominated beneficiary details' header and a 'Nominate a beneficiary' toggle switch, which is currently turned off. At the bottom, there are buttons for 'Back to quote', '< Back', 'Save', and 'Next >'.

# MyApply – annuities online application

## 7. ID verification – adviser certified

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities [Start new quote](#)

**Application - John Smith 00000615 - Incomplete Application**

1 2 3 4 5 6 7 8 9 10 11 12

Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN declaration Complete application

**7 Identification and verification**

**Verification Method**

Digital **Certified ID** **Adviser certified**

**i** Provide the individual's full name and date of birth or residential address. Receipt of a completed form will constitute your agreement as a reporting entity that you have completed the identification and verification of the investor for the purposes of anti-money laundering and counter-terrorism financing laws.

Do you have a Power of Attorney?

Do you have a joint Power of Attorney?

**New POA ID verification**

# MyApply – annuities online application

## 7. ID verification – adviser certified

Resolution Life MyQuote AVP2 user

Application saved successfully

Do you have a joint Power of Attorney?

Please select one of the ID document options below. You must provide all of the details for the selected identification.

**ID document options**

Primary photographic ID	Primary non-photographic ID	Primary non-photographic ID & secondary ID	Aged care facility resident ID
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**Choose one primary photographic ID \***

- Driver's licence issued in Australia or New Zealand containing a photograph of the person.
- An Australian passport issued by the Commonwealth, which has not been expired for 2 years or more.
- Proof of Age Cards issued under a law of a state or territory.
- A national identity card, international driver's licence, international passport or similar document issued by a foreign government, United Nations (UN) or an agency of the UN, containing a photograph and signature of the person.

**Primary photographic ID**

<b>Document type</b> Driver's licence issued in Australi...	<b>Verified from *</b> <input checked="" type="radio"/> Original <input type="radio"/> Certified copy	<b>Document issuer *</b> RTA NSW	<b>Issue date *</b> 01/01/2024	<b>Expiry date *</b> 01/01/2027
<b>Document number *</b> 2423534656	<b>Accredited English translation *</b> <input checked="" type="radio"/> N/A <input type="radio"/> Sighted	<b>Date verified *</b> 29/07/2024		

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)



# MyApply – annuities online application

## 8. Adviser Service Fee

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities [Start new quote](#)

### Application - John Smith 00000615 - Incomplete Application

- Type of investment
- Investor details
- Tax residency
- Investment details
- Payment details
- Beneficiary details
- ID verification
- Adviser Service Fee
- Declaration
- Adviser
- TFN declaration
- Complete application

#### 8 Adviser Service Fee

An **upfront ASF** of  (incl. GST) of amount received

An **ongoing ASF** of  (incl. GST) of the gross regular payments

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)

# MyApply – annuities online application

## 9. Declaration

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities  
Application - John Smith 00000615 - Incomplete [Start new quote](#)

1 2 3 4 5 6 7 8 9 10 11 12  
Type of investment Investor details Tax residency Investment details Payment details Beneficiary ID verification Adviser Service Fee Declaration Adviser TFN declaration Complete application

### 9 Declaration

- I/We have read and understood the Guaranteed Annuities Lifestream Guaranteed Income PDS with an issue date of 4 August 2024, the Policy Document and any Supplementary PDS (where applicable).
- I/We have completed this application in Australia.
- I/We wish to apply to Resolution Life for the Lifestream Guaranteed Income identified in this application.
- I/We declare the answers to all questions, declarations and all information supplied by me/us or on my/our behalf in relation to this application is true and correct (including those not in my/our own handwriting).
- I/We will promptly advise Resolution Life if it changes.
- I/We declare that I am/we are the named person/s or am authorised to provide this information on their
- I/We declare that all the information/documentation required under the anti-money laundering and counter-terrorism financing laws has been completed.
- I/We declare that all the information/documentation required under the Foreign Account Tax Compliance Act (FATCA) has been completed.
- I/We understand that:
  - Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is part of the Resolution Life Group. Resolution Life guarantees all benefit payments under policies described in the PDS.
  - Neither Resolution Life Group nor any of its subsidiaries (other than Resolution Life Australasia Limited to the extent provided in this PDS) guarantee Lifestream Guaranteed Income annuities or the repayment of capital or interest by Resolution Life Australasia Limited. Investments in Lifestream Guaranteed Income annuities are not deposits or other liabilities of Resolution Life Group nor any of its subsidiaries (other than Resolution Life Australasia Limited).
- I/We have read and understood the 'Privacy of your personal information' section of the PDS. I/We acknowledge and consent to the collection, use and disclosure of my/our personal information as detailed in that section.
- I consent to my tax file number being disclosed and acknowledge it is being collected for the purposes of commencing my account and calculating applicable taxes, levies and charges on benefits.
- I acknowledge that Resolution Life is authorised under the Income Tax Assessment Act 1997 (Cth) to collect my TFN, which will only be used for lawful purposes.
- I/We have read the 'Adviser Service Fees' section of the PDS and request Resolution Life to pay the Adviser Service Fee as indicated in Step 8 of this application form.
- I/We understand that:
  - Any Upfront Adviser Service Fee is refundable under the cooling-off provisions of this PDS.
  - Any Ongoing Adviser Service Fee will be deducted from the after-tax regular payment and therefore I/we will receive as payment an amount less than the amount stated as being my regular payment on my quote.
  - Any Adviser Service Fees are negotiated between my/our financial adviser and me/us. Resolution Life does not monitor the amount of the Adviser Service Fee or the service provided by your financial adviser for the fee. Any Adviser Service Fee is paid to your financial adviser's dealer group in accordance with the arrangements Resolution Life has with that dealer group.
  - Where Resolution Life is unable to process a payment of an Adviser Service Fee due to insufficient funds, I/we will deal directly with the financial adviser to make alternative arrangements for payment.
  - Where any part of the investment includes borrowed funds, no percentage based Adviser Service Fee can be paid.
  - The amount used to calculate my annuity regular payments and any Residual Capital Value will not include the Upfront Adviser Service Fee that I/we have authorised Resolution Life to pay.

# MyApply – annuities online application

## 9. Declaration – new digital signature

**Super rollover authorisation**

- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits.
- I consent to my tax file number being disclosed and acknowledge it is being collected for the purposes of commencing my account and calculating applicable taxes, levies and charges on benefits.
- I acknowledge that Resolution Life is authorised under the Income Tax Assessment Act 1997 (Cth) to collect my TFN, which will only be used for lawful purposes.
- I discharge the superannuation provider of my Super fund of all further liabilities in respect of the benefits paid and transferred to Resolution Life.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

**Investor 1**  
John Smith

**Signature of Investor 1**  
By clicking Confirm I agree that the signature below will be the electronic representation of my signature for the purposes of this Application, the acceptance of which by Resolution Life Australasia Limited is a legally binding contract.

**Date**  
dd/mm/yyyy

I do not want to receive marketing information from Resolution Life

[Reset](#)

**Signature of Investor 1**  
By clicking Confirm I agree that the signature below will be the electronic representation of my signature for the purposes of this Application, the acceptance of which by Resolution Life Australasia Limited is a legally binding contract.

[Reset](#) [Confirm](#)

**Super rollover authorisation**

- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits.
- I consent to my tax file number being disclosed and acknowledge it is being collected for the purposes of commencing my account and calculating applicable taxes, levies and charges on benefits.
- I acknowledge that Resolution Life is authorised under the Income Tax Assessment Act 1997 (Cth) to collect my TFN, which will only be used for lawful purposes.
- I discharge the superannuation provider of my Super fund of all further liabilities in respect of the benefits paid and transferred to Resolution Life.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

**Investor 1**  
John Smith

**Signature of Investor 1**  
By clicking Confirm I agree that the signature below will be the electronic representation of my signature for the purposes of this Application, the acceptance of which by Resolution Life Australasia Limited is a legally binding contract.

**Date**  
29/07/2024

I do not want to receive marketing information from Resolution Life

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)

# MyApply – annuities online application

## 10. Adviser

Resolution Life MyQuote Saved quotes AVP2 user

MyQuote annuities **Application - John Smith 00000615 - Incomplete Application** [Start new quote](#)

1 2 3 4 5 6 7 8 9 10 11 12

Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN declaration Complete application

**10 Financial adviser to complete**

Verify the individual's full name and date of birth or residential address. Receipt of a completed form will constitute your agreement as a reporting entity that you have completed the identification and verification of the investor for the purposes of anti-money laundering and counter-terrorism financing laws.

**ID document details**

Investor 1	Document 1	Document 2
Document type	Driver's licence issued in A...	-
Verified from	Original	-
Document issuer	RTA NSW	-
Issue date	01/01/2024	-
Expiry date	01/01/2027	-
Document number	2423534656	-
Accredited English	N/A	-

# MyApply – annuities online application

## 10. Adviser - new digital signature

- I certify that I have provided the Investor(s) with the Guaranteed Annuities Lifestream Guaranteed Income PDS with an issue date of 4 August 2024, the Policy Document and any supplementary PDS (where applicable).
- I have negotiated in accordance with my obligations the Adviser Service Fee indicated in Step 8 of this application and I have read the 'Adviser Service Fees' section of the PDS and I understand that all Adviser Service Fees are paid to my dealer group in accordance with the arrangements between Resolution Life and that dealer group.
- I certify that the adviser sections of the relevant Identification and Verification form for all Investor (s) have been completed.
- If required, I give permission for Resolution Life to contact the Investor(s) directly to clarify any matter in relation to this application.
- By clicking Confirm I agree that the signature below will be the electronic representation of my signature for the purposes of the certification provided by me as the Adviser of the Investor in this Application to Resolution Life Australasia Limited.
- If using the eProcess, I certify that I have read and understood the additional eProcess terms and conditions outlined below.

### eProcess terms and conditions

1. Originals of all documents including copies of verification documents sent via the eProcess must be retained by me and be made available to Resolution Life upon request.
2. Documents sent to the nominated email address are said to be received by Resolution Life on the date we have a record of sending an acknowledgement back to you that the application has been received. If your original email is received after 5pm on a Sydney business day, then we will not view the email until the next Sydney business day.

Adviser name

HMLUFM NBTTH

Sales ID

41607

Email address

hmlup@hgfmgiyvztamlifh.zbs.mo

Phone number

074639450888

Adviser group name

Smgfww Tamllvly Hbaogyblh Tgp Avsvgiu

AFSL number \*

Signature



Date

dd/mm/yyyy

Reset

Confirm

# MyApply – annuities online application

## 11. TFN declaration

Resolution Life MyQuote Saved quotes AVP2 user

Application - John Smith 00000615 - Incomplete Application [Start new quote](#)

1 2 3 4 5 6 7 8 9 10 11 12

Type of investment Investor details Tax residency Investment details Payment details Beneficiary details ID verification Adviser Service Fee Declaration Adviser TFN declaration Complete application

**11a TFN declaration – Investor 1**

You may wish to complete a Tax File Number Declaration if:

- You are investing using personal savings or super money and you wish to claim the tax free threshold and any other applicable tax offsets
- You wish to claim an exemption as you are in receipt of a pension, benefit or allowance
- You wish to claim an exemption because you are under 18 and don't earn enough to pay tax.

It is not an offence to not quote your TFN. However, if you choose not to provide us with your TFN, TFN exemption or a TFN declaration form, we may withhold an amount at the highest marginal tax rate (including applicable levies and charges).

Further instructions on how to complete the TFN Declaration Form may be found [here](#).

Do you wish to complete the TFN Declaration?

Do you wish to claim the seniors and pensioners tax offset?

[Back to quote](#) [< Back](#) [Save](#) [Next >](#)

## 12. Complete application

The screenshot displays the Resolution Life MyQuote interface for an annuity application. At the top, the navigation bar includes the Resolution Life logo, 'MyQuote', 'Saved quotes', and a user profile for 'AVP2 user'. The main heading is 'MyQuote annuities' with a sub-heading 'Application - John Smith 00000615 - Incomplete Application' and a 'Start new quote' button. A progress bar shows 12 steps: 1. Type of investment, 2. Investor details, 3. Tax residency, 4. Investment details, 5. Payment details, 6. Beneficiary details, 7. ID verification, 8. Adviser Service Fee, 9. Declaration, 10. Adviser, 11. TFN declaration, and 12. Complete application. Below the progress bar is a dark blue '12 Application checklist' header. The checklist text reads: 'To process your application, we require all of the following:'. It lists seven steps, each with a green checkmark icon: Step 1: Selected the type of investment. Step 2: Provided your investor details including surname, given name, date of birth and residential address. Step 3: Tax residency status provided. Step 4: Provided your investment details and attached a copy of the of the receipt for the deposit. Step 5: Selected the payment frequency and provided your Australian financial institution details. Step 6: Provided your nominated beneficiary details. Step 7: Provided adviser certified ID documentation details. To the right of the checklist is a 'Submission instructions' box containing three bullet points: 'Please confirm all details are correct.', 'The application must be signed and dated by the investor/s and any additional forms completed offline such as the Tax File Number (TFN) Declaration form and Withholding Declaration form (if applicable) must be completed and attached to the application form.', and 'Please note, a separate TFN Declaration form and Withholding Declaration form must be completed for each Joint Policy Owner (if applicable).'. A final note states: 'If the application is incomplete or the quote has expired, we won't proceed with setting up the annuity until all required information and/or a valid quote is received.'

# MyApply – annuities online application

## 12. Complete application

- ✔ Step 7: Provided adviser certified ID documentation details.
- ✔ Step 8: Provided details of any Upfront Adviser Service Fee and any Ongoing Adviser Service Fee.
- ✔ Step 9: Read the declaration, signed and dated application form.
- ✔ Step 10: Financial adviser completed their details, signed and dated the application form.
- ✔ Step 11: Completed the TFN declaration.

### Quote


- ✔ Attached a valid quote.
- ✔ Attached quote matches application.


### Upload Files


**Investor 1**

**Direct deposit receipt\*** > Attach a copy of the of the receipt for the deposit of the investment amount into the RLA bank account. TEST UAT bank receipt.pdf 

Formats supported: PDF, PNG, JPG File size limit: 10MB

 **Submit application**  
When all items on the Application checklist are complete, you can submit the completed application via eProcess by selecting the **Submit application** button below.

 **Email application**  
Select the **Download application** button below, collect the additional information needed, then scan and email the completed application and documentation via eProcess to [Au.NewBusinessAnnuity@resolutionlife.com.au](mailto:Au.NewBusinessAnnuity@resolutionlife.com.au)

 **Mail application**  
Select the **Download application** button below, collect the additional information needed, then mail the completed application and documentation to  
**Resolution Life**  
**Guaranteed Annuities**  
**GPO Box 3306**  
**SYDNEY NSW 2001**


[Back to quote](#) [< Back](#)

[Email application](#) [Download application](#) [Submit application](#)



# MyApply – annuities online application

## *12. Application submitted electronically*

 **Your application has been submitted**

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We have received your Lifestream Guaranteed Income annuities application form.

We will be in touch with once the request has been processed or if we require any further information.

If you have any questions, please contact us through **chat**.

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**OK**

# MyApply – annuities online application

## 12. Application output

### Guaranteed Annuities

Lifestream Guaranteed Income  
Application form - to be complete by Individuals (PART A)  
Issue date: 4 August 2024

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#### 1 Type of investment

Short Term Income (1-5 years)  Lifetime Income - immediate  
 Long Term Income (6-30 years)  Lifetime Income - deferred

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#### 2a Investor 1 details (Applicant for Policy Owner)

Title MR	Gender Male	
First name John	Surname Smith	Date of birth 01-01-1945
Occupation and position title (please specify if retired) Retired		
Home address Level 39 2 Park Street, Sydney		
State NSW	Postcode 2001	Country Australia
Mobile number +610421435437	Alternative ph. +61	
Email address hello@ria.com.au		
Postal address Same as home address		

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#### 3a Tax residency – Investor 1 (Personal savings only)

Is the individual a tax resident of Australia? Yes  
Is the individual a tax resident of another country? No

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#### 4 Investment details

Purchase price \$10,000.00	Investment Personal Savings
Source of funds for personal savings Savings	Source of wealth Income
Reinvestment No	Existing Policy number N/A
Investment will be made by Direct deposit	

Short Term Income

Short term of 1 year

Residual Capital Value (RCV) - indicate \$10,000.00 OR 100%  
how much of the purchase price you want (Maximum 100% or maximum amount adjusted to meet the minimum payment returned to you at the end of the fixed term. requirements for super).

Automatic reinvestment of the RCV at No  
maturity

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#### 5a Payment details – Investor 1

Frequency Monthly	AUS financial institution Commonwealth Bank of Australia	Account John Smith name
BSB 062161	Account number 24534647	

### Super rollover authorisation

- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits.
- I consent to my tax file number being disclosed and acknowledge it is being collected for the purposes of commencing my account and calculating applicable taxes, levies and charges on benefits.
- I acknowledge that Resolution Life is authorised under the Income Tax Assessment Act 1997 (Cth) to collect my TFN, which will only be used for lawful purposes.
- I discharge the superannuation provider of my Super fund of all further liabilities in respect of the benefits paid and transferred to Resolution Life.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

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Investor 1 John Smith	Signature of Investor 1 * I agree that the signature below is the electronic representation of my signature for the purposes of this Application, the acceptance of which by Resolution Life Australasia Limited is a legally binding contract.	Date 31-07-2024
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I do not want to receive marketing information from Resolution Life

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Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671. Page 7 of 18

# Important information

## What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of the Guaranteed Annuities Lifestream Guaranteed Income annuity product. Colonial First State Investments Limited ABN 98 002 348 352, AFSL No. 232468 (CFSIL) provides platform administration services to Resolution Life in respect of this product, which is offered via the Colonial First State FirstChoice platform.

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. CFSIL can be contacted via [contactus@cfs.com.au](mailto:contactus@cfs.com.au) or by calling **13 13 36**. Resolution Life can be contacted via [resolutionlife.com.au/contact-us](http://resolutionlife.com.au/contact-us) or by calling **133 731**.

AIA Australia has prepared a Target Market Determination which describes the class of consumers that comprise the target market for this product. The Target Market Determination can be sourced at [resolutionlife.com.au/target-market-determinations](http://resolutionlife.com.au/target-market-determinations).

**Thank you**