

Level premium rates

Change of personal details

Information sheet

When to use this form

Use this form to nominate the bank account that you'd like your refund payment to be paid to.

Once you've completed the form and arranged certified confirmation of your identity, please send all documents to us at the address outlined below. We can only accept your original, signed form and certified documents that have a certifier's original signature on them. **Please don't email your documents.**

**Return address: Resolution Life Customer Service,
Reply Paid 90618, Sydney NSW 2001.**

Change in personal information

When nominating your bank account details, we'll need to verify or confirm your identity. We'll do this by checking that certain details you provide in this form match the details in the certified documents you attach.

Identification requirements

For most services or products Resolution Life offer or provide, we are required to comply with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006. This means we may need to collect and verify identification details (ID) from you in order to complete transactions or apply any changes or updates to identification details.

We may decide to delay or refuse any request or transaction if we're concerned that there may be a breach of our legal and regulatory obligations.

For services or products that aren't required to comply with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, Resolution Life will maintain a high standard in requirements concerning requests for changes to essential customer data.

! Please send us original certified copies of your documents—don't send us the original documents. If the document isn't written in English, then you must also attach an English translation prepared by an accredited translator.

How to confirm your identity

1. Make a photocopy of the original document that identifies you. Most people use their driver licence (ensure you copy both sides) or their passport. A full list of documents that can be used for identification purposes can be found below.
2. Take both your original document and the photocopy to an authorised person who can certify.

Only certain people can certify copies including:

- police officer or sheriff
- justice of the peace or notary public
- legal practitioner, magistrate, judge or registrar/deputy registrar of a court
- pharmacist, physiotherapist or veterinary surgeon
- optometrist, dentist, medical practitioner or nurse
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants.

You can see the full list of people who can certify documents or extracts at resolutionlife.com.au/identification.

3. Ask the authorised person to stamp or write 'I certify that this is a true and correct copy of the original document', followed by their signature, full name, qualification, registration number (if applicable) and the date.

Example:

I certify that this is a true and correct copy of the original document.

John Citizen

John Citizen, Justice of the Peace
10 Other Street
Suburb NSW 2000

02 9999 9999 1 July 2025

What ID can be used to confirm your identity?

- Australian driver licence
- Australian passport
- proof of age card (or the equivalent document for your state or territory) that contains your photograph and name
- NSW photo card and birth card or a WA photo card
- a national identity card which is issued by a foreign government, the UN or agency of the UN and contains your photograph, name and signature.

If you don't have any photographic ID, you can provide two pieces of ID from List A or one from List A and one from List B.

List A:

- Australian birth certificate or birth extract
- birth certificate issued by a foreign government, the UN or agency of the UN
- citizenship certificate issued by the Commonwealth
- a Centrelink pension card issued for financial benefits with your name on it.

List B:

- a Centrelink notice regarding a Government assistance payment issued within the last 12 months
- a notice from a local government or utilities provider issued within the last three months. For example, an electricity bill, water bill, or council rates notice
- a Tax Office Notice of Assessment issued to you within the last 12 months.

Additional ID documents for Self-Managed Super Fund (SMSF) policies

SMSF policy owners who nominate the bank account that is held in the name of the SMSF, need to provide us with additional information including:

- a copy of the Fund's Australian Business Number (ABN)
- details of the SMSF Electronic Service Address (ESA), and
- an original or certified copy of the Fund's most recent bank statement.

Additional ID documents for Trust policies

Trust policy owners who nominate the bank account that is held in the name of the Trust need to provide us with additional information.

A registered managed investment scheme, regulated trust or government superannuation fund

One of these:

- evidence of a search of the ASIC, ATO or relevant regulator's website
- the legislation (or relevant extract) establishing the government super fund that's sourced from a government website
- an original certified copy or certified extract of the trust deed.

All other types of trusts:

One of these:

- original certified copy of the trust deed
- certified extract of the trust deed confirming the full name of the trust and trust settlor—as a minimum, we'll accept the front page, recitals and signing page of the trust deed
- a letter from a solicitor or qualified accountant that confirms the name and existence of the trust and trust settlor.

Documents for a company trustee

The document you need to send us depends on the type of company:

Australian company:

- certificate of registration issued by ASIC.

Foreign company registered by ASIC

Both of these:

- certificate of registration issued by ASIC; and
- company extract issued from relevant foreign registration body.

Foreign company not registered by ASIC

- certificate of registration issued by the relevant foreign registration body

Documents for any individual trustee, beneficial owner or controlling person

So that we can verify the identity of any individual trustee, beneficial owner or controlling person you listed in the form, you need to send us the documents shown under option A or B:

Option A

One of these:

- current Australian state or territory driver licence that has your photo
- Australian passport that is current or expired within the last two years
- card issued under a state or territory law to prove your age that has your photo
- current foreign government passport (or similar international travel document) that has your photo and signature

- current foreign driver licence that has your photo
- current national identity card that has your photo.

Option B:**One of these:**

- Australian or foreign birth certificate
- Australian or foreign citizenship certificate
- birth certificate extract
- pension card issued by Department of Human Services
- health card issued by Department of Human Services.

! The documents listed below are only **valid** if they include the customer's full name and residential address.

One of these:

- a document issued by the Commonwealth or a state or territory within the last 12 months that shows financial benefits paid to you
- a document issued by the ATO within the last 12 months that shows money to be paid to you or that you need to pay to them (make sure you cross out your TFN)
- a document issued by a local government body or utility provider within the last three months that shows the services provided to you at your address
- if you're under 18 years old, a notice issued by a school principal within the last three months that shows how long you attended that school.

Privacy – use and disclosure of personal information

The privacy of your personal information is important to us.

We collect and hold personal information about you so we can provide you with financial products and services and assist you with your ongoing financial needs. If we do not collect this information, we may not be able to provide you with these products and services. We may also use your personal information for other purposes, such as enhancing our customer service and product options, and to inform you of opportunities which may be beneficial to you via direct marketing. Please contact us if you do not want to receive this information.

We may also provide information to local and overseas entities which provide Resolution Life with administrative, financial, research or other services, other insurers and credit providers, financial advisers, brokers and other organisations authorised by Resolution Life to assist in reviewing customer needs. A list of countries where these providers are likely to be located can be accessed via our privacy policy.

We may also disclose personal information to courts, tribunals and disputes resolution bodies, government agencies, and other bodies we are required to provide information to under the law.

The Resolution Life privacy policy (available at **resolutionlife.com.au**) provides more information about how we manage and protect your personal information. It sets out how you can access and correct your information, how you may complain about a breach of privacy and our process for resolving privacy related enquiries and complaints.

! Please keep this information sheet for your records — don't return it with your completed form(s).



Change of personal details

1. Your personal details

Please provide the policy number(s) for the product(s) you hold, or previously held with Resolution Life.

Title Date of birth

	<div>DDMMYYYY</div>
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Surname

--

Given name(s)

--

Contact phone number Mobile number

--	--

Address

Suburb State Postcode

--	--	--

Email address

--

2. Your bank account details

Account name

--

BSB Account number

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Note: We won't be able to process your refund payment if you don't send us certified copies of the relevant documents.

3. Authority - must be completed

I/We declare that all the details in this form are true and correct.

If you are signing under Power of Attorney:

I verify that, at the time of signing, I had not received notice of revocation of that Power of Attorney. In the event that a certified copy of the Power of Attorney has not been previously provided, I must submit this with the completed form.

Note: For non-superannuation products, where the owner is under the age of 16, consent of a parent/guardian is required.

Member/Policy owner 1/Power of Attorney signature

X

Date

DDMMYYYY

Member/Policy owner 2 signature (if relevant)

X

Date

DDMMYYYY

4. Checklist

- ☐ Have you completed all relevant sections of this form?
- ☐ Have you signed and dated this form where indicated?
- ☐ Have you attached the original certified copies of your documents?

Where to send this form

Resolution Life Customer Service
Reply Paid 90618
Sydney NSW 2001