

Request for withdrawal of funds/switch between investment option

! Important information

Please note:

To help us process your request quickly, please ensure all sections are completed and all necessary documentation is attached to this form.

Things you should consider before withdrawing your benefit

Before deciding to withdraw your benefit, we recommend that you carefully consider your current benefits and the effect that any cashing of your benefit may have upon these. Depending on your circumstances, cashing in your benefit may have tax implications. Before making a decision to withdraw your benefit, we recommend you speak to a financial adviser. You should seek advice from your taxation adviser in relation to taxation matters.

1. Trustee details

(All fields must be completed)

Policy owner

I/We

Fund name

As Trustee(s) of

request Resolution Life to withdraw / transfer funds (as specified below) in respect of Corporate Super Bond/ Business Super Bonds.

Policy number

Mobile number

Alternate phone number

Postal address

Suburb

State

Postcode

Country

Residential address

Suburb

State

Postcode

1. Trustee details (continued)

Country

Email address

2. Withdrawal transactions

(Please complete either A or B)

A. Partial withdrawal

Enter details against appropriate options

	Amount (dollar (\$) or percentage (%))
<input type="checkbox"/> High Growth	\$ / %
<input type="checkbox"/> Growth	\$ / %
<input type="checkbox"/> Balanced	\$ / %
<input type="checkbox"/> Capital Secure	\$ / %
<input type="checkbox"/> Savings	\$ / %
Total	\$ / %

B. Closure of account (policy document and policy schedule must be attached)

3. Payment details

(Please complete all details of your nominated Australian bank, building society or credit union account)

Account name

BSB number

Account number

3. Payment details (continued)

! Please note:

- The nominated account must be in the name of at least one policy owner
- Direct credit is not available on credit card accounts
- You need to contact your financial institution to verify your account details (due to Privacy Legislation we are unable to contact them on your behalf).

ABN for superannuation fund (where the monies are being paid to)¹

¹ This section is compulsory.

4. Transfer transaction

Switch from	Amount (dollar (\$) or percentage (%))	Switch to	Amount (dollar (\$) or percentage (%))
<input type="checkbox"/> High Growth	\$ / %	<input type="checkbox"/> High Growth	\$ / %
<input type="checkbox"/> Growth	\$ / %	<input type="checkbox"/> Growth	\$ / %
<input type="checkbox"/> Balanced	\$ / %	<input type="checkbox"/> Balanced	\$ / %
<input type="checkbox"/> Capital Secure	\$ / %	<input type="checkbox"/> Capital Secure	\$ / %
<input type="checkbox"/> Savings	\$ / %	<input type="checkbox"/> Savings	\$ / %
Total	\$ / %	Total	\$ / %

5. Policy document and policy schedule

If you are requesting a full withdrawal only, please return the original policy document and policy schedule. In the event of your policy document being lost, please complete the declaration in **section 7**.

Yes, I enclose the original policy document and policy schedule

6. 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 one of the following occupations:

- Chiropractor
- Dentist
- Legal practitioner
- Medical practitioner
- Nurse
- 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

6. 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) or a person who is in the following list:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- An officer with, or a credit representative of, a holder of an Australian Credit Licence (ACL), having two or more years of continuous service with one or more licensees
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years of continuous service with one or more licensees
- Australian Consular Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Consul-General
 - b. Consul
 - c. Vice-Consul
 - d. Trade Representative
 - e. Consular Agent
- Australian Diplomatic Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Ambassador
 - b. High Commissioner
 - c. Minister
 - d. Head of a Mission
 - e. Commissioner
 - f. Charge d’Affaires
 - g. Counsellor, Secretary or Attache at an Embassy, High Commissioner’s office, Legation or similar
- 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 the Australian Trade and Investments Commission who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place
- Employee of the Commonwealth 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 his or her function in that place
- Fellow of the National Tax Accountants’ Association
- 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 of a court
- 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 Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- 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 two or more years of continuous service or
 - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- 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 of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of:
 - a. the Commonwealth or a Commonwealth alignment
 - b. a State or Territory or a State or Territory alignment
 - c. a local government authority or
 - d. With two or more years of continuous service and the person is not already specified in another item on 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 Service employee of:
 - a. The Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff’s officer
- Teacher employed on a full-time basis at a school or tertiary education institution.

7. Signature(s) of Trustee(s)¹

By signing this form I declare as follows:

- I declare that the answers given on this form are true and correct.
- I understand that, unless this is a partial withdrawal, the payment of this benefit will be in full and final settlement of all my rights and interests in relation to the Policy.
- I understand that once my withdrawal is finalised it will not be reversed.
- 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 box below if you have lost your Policy Schedule and Policy Document

I/We confirm that I/we have lost the policy schedule and policy document and declare:

- The policy owner(s) is/are the legal owner(s) of the above named Policy.
- I/We have made a thorough search for the policy schedule and policy document(s) and they cannot be found.

Trustee(s) 1

Trustee(s) 2

Trustee(s) 3

Trustee(s) 4

Witness

Witness

Date

1 Please ensure all parties signing provide ID as detailed in section 6.

Where to send this form

This form must be mailed to:

Resolution Life
Reply Paid 3306
Sydney NSW 2001

Contact phone number

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

You can also email a scanned copy to
au.service@resolutionlife.com.au

What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of this product.

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