

# Benefit payment request

## Non Superannuation & External Trustees

### Important information

This form must be mailed to: **Resolution Life, GPO Box 3306, SYDNEY 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**

### Please note:

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

### Section 1 – Personal details (all fields must be completed)

Policy number	<input type="text"/>	Client number	<input type="text"/>
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other	<input type="text"/>	
Given name(s)	Surname	Date of birth (dd/mm/yyyy)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Second policy owner given name(s)	Second policy owner surname	Date of birth (dd/mm/yyyy)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Postal address			
<input type="text"/>			
	State	Postcode	Country
Residential address			
<input type="text"/>			
	State	Postcode	Country
Mobile number	Alternate phone number		
<input type="text"/>	<input type="text"/>		
Email address			
<input type="text"/>			

### Section 2 – Withdrawal details

- ☐ Full withdrawal/All units
- ☐ Partial withdrawal (This is not applicable to all products. Please refer to your policy document.)

Investment option	Amount/units to release
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

### Section 3 – Payment details (please complete all details of your nominated Australian bank, building society or credit union.)

Account name	BSB number	Account number
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Please note:

- 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.)

## Section 4 – Policy document

☐ I enclose the original policy document

In the event of your policy document being lost, please complete the declaration in **section 7**.

## Section 5 – Additional requirements for external trustees

If you are an external trustee, please complete this section:

- ☐ I enclosed a certified copy of documentation (e.g. minutes of meetings, trust deed) that verifies who the current signatories are.
- ☐ I have also enclosed certified ID for each signatory, based on the requirements outlined in **section 6**.

## Section 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 Australia in one of the following occupations:

- 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
- Nurse
- Occupational therapist
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trade marks attorney
- Veterinary surgeon

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;



*This is a true and correct copy of the original.*

*JOHN CLARKE - Justice of the Peace - 01.08.19*

(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

## Section 6 – Identification requirements (continued)

- 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 7 – Policy owner declaration

**Please note:** please ensure that you have attached a certified copy of any one of the following documents as specified in **section 6**: a certified copy of your driver licence (copy of both front and back required) or passport.

By signing this request 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 I am signing under a Power of Attorney, I have not received revocation of the Power.

**Please indicate in the tick box below if you have lost your policy schedule and policy document.**

- ☐ I/We confirm that I/we have lost the policy document (which may include a 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 document(s) and they cannot be found.

## Section 7 – Policy owner declaration (continued)

### Signature(s) of policy owner(s)

Policy owner 1

Date (dd/mm/yyyy)

Policy owner 1

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 this product. Any advice in this document is provided by Resolution Life and is general advice and does not take into account your objectives, financial situation or needs. Before acting on this advice, you should consider the appropriateness of the advice having regard to your objectives, financial situation and needs, as well as the product disclosure statement and plan document, available from Resolution Life at [resolutionlife.com.au](https://resolutionlife.com.au) or by calling 133 731, before making a decision on whether to continue to hold the product. Resolution Life is part of the Resolution Life Group and can be contacted via [resolutionlife.com.au/contact-us](https://resolutionlife.com.au/contact-us) or by calling the phone number mentioned above.