

Benefit payment request non-superannuation policies and external trustee policies

Important information

This form may be posted to: **Resolution Life, GPO Box 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**.

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

Policy number

Policy owner 1 details

Given name(s) Surname Date of birth (dd/mm/yyyy)

Residential address

Postal address

Mobile number Alternate phone number Email address

Policy owner 2 details

Given name(s) Surname Date of birth (dd/mm/yyyy)

Residential address

Postal address

Mobile number Alternate phone number Email address

Section 2 – Withdrawal details (for unit linked policies)

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

| Investment option name | Amount (\$) / units to release |
|------------------------|--------------------------------|
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |

Section 3 – Withdrawal details (Whole of Life, Endowment, Pure Endowment and PruPac policies)

- ☐ Full withdrawal
- ☐ Full withdrawal upon maturity – please process my benefit payment once my policy matures on

Section 3 – Withdrawal details (continued)

- ☐ Partial withdrawal (only applicable if your policy allows the collection of bonuses or the withdrawal of a savings component on your policy)

Please pay me \$ of the current surrender value of my reversionary bonuses

Please pay me \$ of the savings component that matures on / /

Please note:
the collection of the bonuses on your policy will result in the death benefit on your policy decreasing by a greater amount than what you have withdrawn.

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Section 4 – Payment details (please complete all details of your nominated Australian bank, building society or credit union.)

Account name

BSB number

Account number

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).

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Section 5 – Policy document

If you are requesting a full withdrawal only, please return the original policy document. In the event of your policy document being lost, please complete the declaration in **section 9**.

- ☐ I enclose the original policy document.

Section 6 – Additional requirements for external trustees

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

- ☐ I enclose a certified copy of documentation (e.g. minutes of meetings, trust deed) that verify who the current signatories are.
- ☐ I have also enclosed certified identification for each signatory, based on the requirements outlined in **section 7**.

Section 7 – 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:

- 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



This is a true and correct
copy of the original.

JOHN CLARKE - Justice of the Peace - 01.08.19

Section 7 – 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);
- 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;
 - (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
- 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 8 – For overseas residents only

Please complete this section if you reside in a country other than Australia.

Your occupation/business activity:

Section 9 – Declaration and acknowledgment

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.

☐ 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.

Signature(s) of policy owner(s)

Policy owner 1 signature

Date (dd/mm/yyyy)

Policy owner 2 signature

Date (dd/mm/yyyy)

What you need to know

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