FUTURITY

Bond Estate Nomination Form

This form is to be used if you wish to make or change Bond Estate Nominations. Any current Bond Estate Nominations or Future Activated Transfer arrangements will be cancelled and replaced by this new instruction.

If a partial nomination is made by allocating less than 100% total to the Bond Estate Nomination selection, the unallocated percentage will be paid to the Bond Owner(s) or pass under the will and legal estate of the last surviving Bond Owner in the event of a Bond Death Maturity occurring.

Section 1 – Bond Owner details

Client number(s): CL5 Bond number:

CL5

Bond Owner(s):

Email:

Phone:

Section 2 – Bond Estate Nominee(s)

I/We direct and instruct Futurity Investment Group Limited (Futurity):

(a) that if Bond Death Maturity occurs, that my/our Bond Balance shall be paid to the Bond Estate Nominees (named below) in accordance with the percentage entitlements as indicated;

(b) that I/we agree that additional identification verification will be required in line with Anti-Money Laundering and Counter-Terrorism Financing Laws as and when appropriate.

Bond Estate Nominees – Individual persons nominated

Bond Estate Nominee 1

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address: (not a PO Box)

Email: Phone:

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Bond Estate Nominee 2

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address: (not a PO Box)

Email: Phone:

Bond Estate Nominee 3

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address: (not a PO Box)

Email: Phone:

Bond Estate Nominee 4

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address: (not a PO Box)

Email: Phone:

Bond Estate Nominee 5

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address: (not a PO Box)

Email: Phone:

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Bond Estate Nominee 6

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other (please specify):

First name: Middle name:

Surname:

Date of birth: / / % of Bond Balance: %

Residential address:
(not a PO Box)

Email: Mobile:

Bond Estate Nominees – Legal entities nominated

Bond Estate Nominee 7

Full name as registered by ASIC or under State law*:

Registered office address:
(not a PO Box)

Principal place of business:
(if different from registered office.
PO Box is NOT acceptable)

ACN/ABN: % of Bond Balance: %

Total % of Bond Balance allocated:

If you wish to nominate additional Bond Estate Nominees, please contact Futurity.

* **Important:** If you are nominating a legal entity such as a company or incorporated association, please take care as to correctly name and identify the legal entity – we recommend that you seek independent professional advice..

Section 3 – Preferred survivorship rule

Important: Please provide a selection below. If you do not provide a selection, your preferred survivorship rule will default to joint survivorship.

I/We nominate the following survivorship rule:

☐ **Joint survivorship (default)** – if a Bond Estate Nominee, who is a natural person, dies before a Bond Death Maturity event occurs, then their respective share shall lapse and shall be allocated on a joint survivorship basis to the surviving Bond Estate Nominee or Nominees on a pro-rata basis in accordance with their applicable proportional entitlement according to the percentages of the Bond Balance allocated to them.

☐ **'Down-the-line' survivorship** – if a Bond Estate Nominee, who is a natural person, dies before a Bond Death Maturity event occurs, their respective share shall pass 'down-the-line' to their legal personal representative to deal with in accordance with their will and legal estate arrangements.

Section 4 – Declaration and signature

I/We confirm that, to the best of my/our knowledge, the information provided on this form is true and correct.

I/We authorise Futurity Investment Group Limited to act on and process the instructions set out in this form.

I/We confirm that I/we have obtained a copy of the current combined Financial Services Guide and Product Disclosure Statement, have read and understood it and agree to be bound by the terms and conditions contained within the document.

I/We agree that if I/we have previously granted or in future shall grant power(s) of attorney, then unless express power is given by me/us in such power(s) of attorney, it is not my/our intention that such instrument(s) can be used to change or revoke this Bond Estate Nomination.

I/We agree that if I/we transfer my/our bond, then this Bond Estate Nomination shall be cancelled and revoked with effect as from the date of the transfer.

Bond Owner / Director / Trustee 1		**Bond Owner / Director / Trustee 2**	
Signature:		Signature:	
Print name:		Print name:	
Capacity:		Capacity:	
Date:	/ /	Date:	/ /

To submit your completed form, please log into your online portal and use the document upload function to securely share this document with us.

Futurity Investment Group Limited

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