FUTURITY

Change of Bond Details Form

This form is to be used to change the bond term, bond type, the personal details of anyone associated on the bond who can give us instructions. Please ensure that you complete Sections 1, 7 and any other sections that are relevant to your request. The remaining sections may be left blank. If changing name and/or address details, you will need to attach proof of the change, such as a certified marriage certificate or other relevant documents.

Please call us on 1300 345 456 if you need assistance completing this form.

Section 1 – Bond Owner details

Client number(s): CL5 Bond number:

CL5

Bond Owner 1:

Bond Owner 2:

Email of Bond Owner 1 or 2 :

Phone:

Section 2 – Change of bond term

I/We wish to change the bond term on my/our bond to years (up to 99 years).

Section 3A – Change of personal details (Person 1)

Use this section to change the personal details of anyone associated on your bond including Bond Owners, Appointed Associates, Bond Estate Nominees and Future Activated Transfer recipients. This section can also be used to change the personal details of Education Beneficiaries for Futurity Education Bonds.

Name of person changing personal details:

Previous address:

Current address:

Previous name:

Current name:

Previous email:

Current email*:

Previous phone number:

Current phone number:

* An updated email address, including the one used to complete this form, may replace your nominated email address if already subscribed to Futurity Investment Group Limited newsletters but can be updated at any time.

Section 3B – Change of personal details (Person 2)

Use this section to change the personal details of anyone associated on your bond including Bond Owners, Appointed Associates, Bond Estate Nominees and Future Activated Transfer recipients. This section can also be used to change the personal details of Education Beneficiaries for Futurity Education Bonds.

Name of person changing personal details:

Previous address:

Current address:

Previous name:

Current name:

Previous email:

Current email*:

Previous phone number:

Current phone number:

* An updated email address, including the one used to complete this form, may replace your nominated email address if already subscribed to Futurity Investment Group Limited newsletters but can be updated at any time.

Section 4 – Change of instruction authority

Please elect which joint Bond Owners, Bond Representatives or Bond Guardians (Incumbents) have authority to instruct us on your bond and bind the other Incumbent(s) for transactions (including additional contributions, switches and withdrawals where authorised). Note that any change to this election will require signatures based on the existing authority instructions.

Select the role type you are changing authority on

☐ Bond Owner(s) ☐ Bond Representative(s) ☐ Bond Guardian(s)

Instruction authority

☐ All Incumbents (default) ☐ Only Incumbent 1
☐ Only Incumbent 2 ☐ Any Incumbent

Section 5 – Change of bond type (For Futurity Education Bond only)

☐ **I/We currently hold an Individual Education Bond and want to change it to a Family Education Bond.**

If you are changing to a Family Education Bond, you may wish to complete Section 6 to add Education Beneficiaries to your bond.

☐ **I/We currently hold a Family Education Bond and want to change it to an Individual Education Bond.**

Individual Education Bonds are limited to one Education Beneficiary per bond. If you currently have more than one Education Beneficiary, you can use Section 6 to remove Education Beneficiary(s).

Section 6 – Change of Education Beneficiary (For Futurity Education Bond only)

For the Individual Education Bond, only one Education Beneficiary can be nominated per bond, and for the Family Education Bond, you can appoint up to ten Education Beneficiaries.

Education Beneficiary 1

Is this Education Beneficiary being replaced, appointed or removed?

Individual Education Bond

☐ Replacement of Individual Education Beneficiary

Family Education Bond

☐ Appoint ☐ Remove

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address: (not a PO Box)

Phone:

Email:

If you are appointing a new Education Beneficiary, do you also wish to nominate them as a Life Insured*? ☐ Yes ☐ No

For Family Education Bond only – please select the class of beneficiary that will apply to this Education Beneficiary:

Class of beneficiary: ☐ Family Class ☐ Friends Class

* A Life insured cannot be removed from a bond.

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Education Beneficiary 2

Is this Education Beneficiary being appointed or removed? ☐ Appoint ☐ Remove

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address: (not a PO Box)

Phone:

Email:

If you are appointing a new Education Beneficiary, do you also wish to nominate them as a Life Insured*? ☐ Yes ☐ No

For Family Education Bond only – please select the class of beneficiary that will apply to this Education Beneficiary:

Class of beneficiary: ☐ Family Class ☐ Friends Class

Education Beneficiary 3

Is this Education Beneficiary being appointed or removed? ☐ Appoint ☐ Remove

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address: (not a PO Box)

Phone:

Email:

If you are appointing a new Education Beneficiary, do you also wish to nominate them as a Life Insured*? ☐ Yes ☐ No

For Family Education Bond only – please select the class of beneficiary that will apply to this Education Beneficiary:

Class of beneficiary: ☐ Family Class ☐ Friends Class

* A Life insured cannot be removed from a bond.

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Education Beneficiary 4

Is this Education Beneficiary being appointed or removed? ☐ Appoint ☐ Remove

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address:
(not a PO Box)

Phone:

Email:

If you are appointing a new Education Beneficiary, do you also wish to nominate them as a Life Insured*? ☐ Yes ☐ No

For Family Education Bond only – please select the class of beneficiary that will apply to this Education Beneficiary:

Class of beneficiary: ☐ Family Class ☐ Friends Class

Education Beneficiary 5

Is this Education Beneficiary being appointed or removed? ☐ Appoint ☐ Remove

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address:
(not a PO Box)

Phone:

Email:

If you are appointing a new Education Beneficiary, do you also wish to nominate them as a Life Insured*? ☐ Yes ☐ No

For Family Education Bond only – please select the class of beneficiary that will apply to this Education Beneficiary:

Class of beneficiary: ☐ Family Class ☐ Friends Class

* A Life insured cannot be removed from a bond.

Section 7 – 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 acknowledge that a Life Insured cannot be removed from my/our bond once applied.

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.

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.

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