FUTURITY

Estate Finalisation Claim Form (Death of Life Insured)

This form is to be used when a Bond Death Maturity event occurs. For Futurity Investment Group Limited (Futurity) to finalise this claim, we will require a certified copy of the death certificate and/or a certified copy of Probate of the life insured as well as ID from the claimant such as a driver's licence or passport and proof that the claimant is authorised to make this claim.

Futurity will contact you once we have assessed your claim with any further requirements or information in order to complete this claim. Please contact Futurity if we can assist you with any queries on 1300 345 456 or investorcare@futurityinvest.com.au.

Section 1 – Bond details

Client number(s): CL5

CL5

Bond number:

Section 2 – Details of deceased life insured

Name:

Date of death: / /

Section 3 – Details of claimant

Type of claimant:

- ☐ Bond Owner(s) (different person from life insured)
- ☐ Executor
- ☐ Administrator
- ☐ Bond Estate Nominee (separate form for each)
- ☐ Legal practitioner
- ☐ Other person with legal authority to make a claim: (please specify)

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

First name: Middle name:

Surname:

Address:

Phone:

Email:

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Are you a Politically Exposed Person? (refer to the Product Disclosure Statement for the definition) (please tick): ☐ Yes ☐ No

If 'Yes' to the above question, please provide your source of wealth:

- ☐ Employment income
- ☐ Business ownership or business income
- ☐ Investment income or capital growth
- ☐ Sale of a business or major asset
- ☐ Inheritance
- ☐ Gift/Donation
- ☐ Compensation or insurance payout
- ☐ Superannuation/Pension

Other: (please specify)

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) Laws, we are required to ask for additional tax residency information.

Are you a tax resident of Australia? ☐ Yes ☐ No

Are you a tax resident of a country other than Australia or a Specified U.S. Person? ☐ Yes ☐ No

If 'Yes' to the above question, you will need to complete a separate FATCA/CRS Form available on our website.

Section 4 – Payment details

Please provide your Australian financial institution account details for the death benefit payment.

BSB number: Account number:

Name of financial institution:

Account name:

Important: Please ensure all details are correct. An incorrect BSB or account number will result in payment being made to the wrong account which could result in the loss of funds.

Section 5 – Declaration and signature

I/We confirm that the information provided on this form is true and correct. I/We further confirm that I/we have legal authority to make this claim, which I/we authorise Futurity to process in accordance with instructions set out in this form.

I/We confirm that this claim is made subject to the Product Rules and the current Product Disclosure Statement.

Claimant Authorised Signatory 1

Signature:

Print name:

Capacity:

Date: / /

Claimant Authorised Signatory 2

Signature:

Print name:

Capacity:

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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