FUTURITY

Future Activated Transfer Form

This form is for the transfer of bond ownership from one or more parties to others at a future date or event (such as the death of the last surviving Bond Owner).

A transfer of bond ownership may have taxation consequences. Please seek independent professional advice for your specific personal circumstances if you are unsure or require advice.

Upon transfer of the bond, no further payments will be made to your Financial Adviser and their Authorised Functions will cease.

Any current Bond Estate Nominees or Future Activated Transfer arrangements will be cancelled and replaced by this new instruction. The appointment of any relevant Appointed Associates will be cancelled and revoked upon transfer. Existing Regular Savings Plan arrangements, Regular Withdrawal Plan arrangements (for Futurity Investment Bonds), auto-reweight facility and dollar cost averaging facility will also be removed upon transfer.

Section 1 – Current Bond Owner details (Transferor)

Client number(s): CL5 Bond number:

CL5

Bond Owner(s):

Email:

Phone:

Section 2 – Future Activated Transfer recipient details

Future Activated Transfer recipient 1

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address:
(not a PO Box)

Email:

Phone:

Natural person Future Activated Transfer recipient(s) will be registered as additional life/lives insured to the bond.

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Future Activated Transfer recipient 2

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

First name: Middle name:

Surname:

Date of birth: / /

Residential address: (not a PO Box)

Email:

Phone:

Natural person Future Activated Transfer recipients will be registered as additional life/lives insured to the bond.

If there are more than two Future Activated Transfer recipients, please contact us prior to submitting this form.

Section 3 – Future Activated Transfer condition (to be Completed by Transferor)

Select when the future transfer of your bond is to be activated:

☐ Transfer upon the death of the last surviving Bond Owner (for individual and joint individuals only)

OR

☐ Transfer on the following date: / /

If the death of the last surviving Bond Owner occurs before the set transfer date, your Bond Guardian/Legal Personal Representative will hold the bond for future activation.

Important: For a Future Activated Transfer to become legally effective, it is a requirement of the *Life Insurance Act 1995* (Cth) that a Future Activated Transfer Form (Memorandum of Transfer) is completed. This must be signed by the person(s) transferring the bond and also by the Future Activated Transfer recipient(s) (i.e the person(s) who will become the bond's new owner(s) upon the transfer being registered by us). If the Future Activated Transfer recipient is under the age of 16, a parent and/or guardian can sign on their behalf (including signed by you if applicable).

Upon completion, this Future Activated Transfer Form will be deemed a Memorandum of Transfer, which can be executed in counterparts. Futurity Investment Group Limited (Futurity) will recognise and effect the transfer upon the person(s) transferring the bond having undertaken all steps to complete the transfer, and the Future Activated Transfer recipient(s) subsequently accepting the Memorandum of Transfer.

Additional identification verification will be required in line with Anti-Money Laundering and Counter-Terrorism Financing Laws as and when appropriate.

Natural person Future Activated Transfer recipient(s) will be registered as additional life/lives insured to this bond.

Upon transfer, any existing Bond Estate Nomination and relevant Appointed Associates will be cancelled and revoked. Existing Regular Savings Plan arrangements, Regular Withdrawal Plan arrangements (for Futurity Investment Bonds), auto-reweight facility and dollar cost averaging facility will also be removed upon transfer.

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 agree that if I/we transfer this bond before the stated Future Activated Transfer date or event, then the Future Activated Transfer instruction will be cancelled and revoked with effect as from the date of the transfer.

I/We cancel and revoke all previous Future Activated Transfer instructions made by me/us for this bond.

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 (Transferor 1)		**Bond Owner (Transferor 2)**	
Signature:		Signature:	
Print name:		Print name:	
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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