

SWITCH OPTION FORM

Please:

- PRINT clearly in black pen keeping within the allocated area
- Mark any boxes with an 'X' where applicable
- Call Client Services on **1800 804 731** if you have any questions.
- **Note: A switch in or out of the Capital Guaranteed investment option is not permitted.**
- Ensure you complete this form with all required information. Incomplete forms will be returned and may delay your request being processed.

Has ownership of this policy been assigned to a funeral director?

Yes, **funeral director** completes form No, **investor/s** completes form

1. MEMBER DETAILS

Policy/Certificate number:

Member 1 (Individual investor)

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

Surname:

Given name(s):

Residential address (not PO Box):

Suburb: State: Postcode:

Phone: Mobile:

Email: Date of birth: //

Member 2 (Joint investor)

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

Surname:

Given names:

Residential address (not PO Box):

Suburb: State: Postcode:

Phone: Mobile:

Email: Date of birth: //

Funeral Director (as assigned owner)

Name of Funeral Director:

Business address (not PO Box):

Suburb: State: Postcode:

Phone: Mobile:

2. INVESTMENT OPTION ALTERATION REQUEST

From existing details (select one): Conservative Moderate

To new details (select one): Conservative Moderate

100% of investment must be transferred to the new investment option.

Note: Please refer to the current Product Disclosure Statement available at fpmanagement.com.au for information on investing transaction costs and up to date investment options information.

3. DECLARATION AND SIGNATURE

I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained the Product Disclosure Statement for future reference.

Signature(s) (all members must sign and date this form)

Signature of Member 1 or Funeral Director as assigned owner

Signature of Member 2

X

X

Date: //

Date: //

Return your completed form to Funeral Plan Management Pty Ltd via:

E funeral.plans@lifeplan.com.au
F 1800 812 799
P Reply Paid 89, Adelaide SA 5001

ADDRESS: GPO Box 89, Adelaide SA 5001
TELEPHONE: 1800 804 731 (freecall)
EMAIL: funeral.plans@lifeplan.com.au
WEBSITE: fpmanagement.com.au

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