

# Nomination of Beneficiaries Form



The Policyowner may nominate beneficiaries to receive allocated shares of the Benefit Amount payable under their Policy on their death, in accordance with their most recent valid beneficiary nomination.

## Valid beneficiary nomination

To make a valid beneficiary nomination, the Policyowner must correctly complete this Nomination of Beneficiaries Form by providing details of nominated beneficiaries in accordance with the rules and procedures on page 2 and return it to: Policyowner Services, Woolworths Insurance, Reply Paid 6728, Baulkham Hills NSW 2153.

If a valid beneficiary nomination does not exist at the date of the Policyowner's death, the Benefit Amount will be paid to their legal personal representative, or other person that the insurer is legally permitted to pay.

## Privacy

Greenstone Financial Services Pty Ltd on behalf of Swiss Re Life & Health Australia Limited ("we", "us" or "our") collects the following personal information in order to record your nominated beneficiaries and to assist in the management of future claims. You confirm that you have gained consent from the individuals to provide this information. This information will be shared with your insurer and any of its service providers, including claims assessors should you lodge a claim under your Policy. If you fail to provide the requested information, or do not provide the information in full, your nomination will be deemed invalid and will not be processed. We are unlikely to send your information to any foreign jurisdiction. You can obtain a copy of our Privacy Policy, which contains information about accessing and correcting information and how to complain about a breach of the Privacy Principles, on our website or you can request a copy by contacting us on **1300 10 1234** weekdays between 8am to 8pm AEST except public holidays.

## Example of how to nominate a Beneficiary(ies)

### To be completed by the Policyowner

Your Policy number	Policyowner title	Policyowner's first name	Policyowner's surname
410123456	Mrs	Sandi	Jones

### Details of nominated beneficiaries

Full name of nominated beneficiary	Address	Phone Number	Date of birth	Relationship to Policyowner	Proportion of Benefit (%)
Mr Travis Smith	1 Sample Street, Smithville NSW	02 1234 5678	01/05/1980	Brother	30%
Ms Sarah Jones	35 Sample Street, Smithville NSW	02 5678 1234	30/06/1995	Daughter	70%
			DD/MM/YYYY		%
			MM/YY		%
			DD/MM/YYYY		%

**SAMPLE**

Must add up to 100%

## Policyowner declaration

I hereby nominate the persons named above to receive the allocated shares of the Benefit Amount payable on my death. I understand and agree that the nominations will not become valid until the correctly completed and signed form has been received.

Your Policy number:

Name of Witness:

Signature of Policyowner:

 Sandi Jones

Signature of Witness (cannot be a nominee):

 Michael Young

Date of birth

Today's date

Date of birth

Today's date

## Rules and Procedures

To make a valid nomination the Policyowner must provide details of the nominated beneficiaries in the table below. The following additional rules and procedures apply:

- up to 5 beneficiaries can be nominated with a specified whole percentage share for each beneficiary that must total 100%;
- only natural persons can be nominated (not, for example companies or organisations);
- nominations must be made by the Policyowner sending us a validly completed and signed nomination form, or by calling us. A nomination takes effect when it is received by us;
- nominations may be varied by the Policyowner sending us a new validly completed and signed nomination form, or by calling us. A new nomination takes effect when it is received by us;
- if the nominated beneficiary is a minor when the benefit is payable, his or her specified percentage share will be paid to a trustee or a legal guardian for the benefit of the minor during his/her minority;
- if the nominated beneficiary dies before the Policyowner, the nomination in favour of that beneficiary fails and the percentage share specified for the deceased beneficiary will be paid to the Policyowner's legal personal representative (or other person that we are legally permitted to pay). The remaining nominations, if any, will continue to be effective; and
- if the Policy ownership changes e.g. due to assignment, any existing nomination will be invalidated.
- the Policyowner signature and the witness signature must be completed on the same date;
- if an error is made on the form and it requires correction, an initial by the Policyowner is to be made next to the correction for the form to be accepted; and
- the nomination form must be received by us within 60 days of the date it is signed or the form will not be accepted, and a new nomination will be required either by a validly completed and signed Nomination of Beneficiaries Form, or calling us.

Once the completed form has been received, the Policy details will be updated and the Policyowner will be issued with a revised Policy Schedule.



Woolworths

### To be completed by the Policyowner

Your Policy number	Policyowner's title	Policyowner's first name	Policyowner's surname

### Details of nominated beneficiaries

Full name of nominated beneficiary	Address	Phone number	Date of birth	Relationship to Policyowner	Proportion of Benefit (%)
1.			DD / MM / YYYY		%
2.			DD / MM / YYYY		%
3.			DD / MM / YYYY		%
4.			DD / MM / YYYY		%
5.			DD / MM / YYYY		%

**Must add up to 100%**

### Policyowner Declaration

I hereby nominate the persons named above to receive the allocated shares of the Benefit Amount payable on my death. I understand and agree that the nominations will not become valid until the correctly completed and signed form has been received.

Your Policy number:

Name of Witness:

Signature of Policyowner:

Signature of Witness (cannot be a nominee):

Date of birth

Today's date



Date of birth

Today's date



Please return this form to Woolworths Insurance, Policyowner Services, Reply Paid 6728, Baulkham Hills NSW 2153 (no stamp required)

**Important things you should know:** This is general information and does not take into account your financial situation. This Woolworths Insurance product is issued by the insurer, Swiss Re Life & Health Australia Limited ABN 74 000 218 306, AFSL 324908, and administered by Greenstone Financial Services Pty Ltd ABN 53 128 692 884, AFSL 343079. The terms and conditions are set out in the relevant Product Disclosure Statement.

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