

CHANGE OF DETAILS

INVESTMENT GROWTH BOND

CommInsure



THIS FORM SHOULD BE USED FOR POLICIES OPENED ON OR AFTER 18 March 2013.

Please write in **BLOCK** letters and use a **black** ballpoint pen.

SECTION 1 — NEW PERSONAL OR COMPANY DETAILS (APPLICANT)

Policy Number

Bond Owner 1

Title Date of birth

Surname Given name(s)

Other names known by (if any) or Full Company/Business Trust name

Residential/Business address* (PO Box is not acceptable)

State Postcode Country

Home number Business number

Mobile Facsimile

Bond Owner 2

Title Date of birth

Surname Given name(s)

Other names known by (if any) or Full Company/Business Trust name

Residential/Business address* (PO Box is not acceptable)

State Postcode Country

Home number Business number

Mobile Facsimile

SECTION 2 — NEW AUTOMATIC WITHDRAWAL FACILITY DETAILS (AVAILABLE TO INVESTMENT OF AT LEAST \$10,000)

Please complete the banking details to enable funds to be deposited into an account.

Note: we will not pay automatic regular withdrawals by cheque.

Frequency (please indicate (✓))

Monthly Quarterly Half-yearly Yearly

Amount of each payment (minimum \$500)

\$

Name of financial institution

Account name (must be in the name of the Bond Owner(s)) BSB (Branch Number) Account Number

First withdrawal date Last withdrawal date (if required)

Rate of increase in payments Nil or % each year

SECTION 3 — SWITCHING INVESTMENT OPTIONS (FUNDS)

Please complete the amount you wish to switch in the 'Switch from' and 'Switch to' columns.

Ensure the totals of each column are equal. The minimum switch is \$200 per Fund.

Investment option	Switch from*	Switch to*
NC – Cash (3NCS)	\$	\$
NC – Global Fixed Interest (3NFI)	\$	\$
NC – Conservative (3NCO)	\$	\$
NC – Diversified (3NDI)	\$	\$
NC – Balanced (3NBA)	\$	\$
NC – Growth (3NGR)	\$	\$
NC – Global Property (3NPR)	\$	\$
NC – Australian Shares (3NAU)	\$	\$
NC – International Shares (3NIN)	\$	\$

* If you switch the full amount and you previously nominated your Adviser Service Fee to be deducted from the 'Switch from' investment option we will now deduct the Adviser Service Fee from the 'Switch to' investment option.

SECTION 4 — ADDITIONAL INVESTMENTS

Minimum is \$200 per Fund. The minimum initial investment is \$1,000. Cash deposits will not be accepted.

Investment option	Amount
NC – Cash (3NCS)	\$
NC – Global Fixed Interest (3NFI)	\$
NC – Conservative (3NCO)	\$
NC – Diversified (3NDI)	\$
NC – Balanced (3NBA)	\$
NC – Growth (3NGR)	\$
NC – Global Property (3NPR)	\$
NC – Australian Shares (3NAU)	\$
NC – International Shares (3NIN)	\$

Please indicate (✓) how you will be paying

- Cheque (Please attach with this form)
- BPAY® (Important: please refer to page 12 of the PDS before using BPAY®)

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SECTION 5 — ADVISER SERVICE FEE(S)

- I wish to cease the adviser service fee arrangement on my policy ▶ Go to Section 6
- I wish to vary the adviser service fee arrangement on my policy ▶ Complete the details below in Section 5

Complete this section if you consent for CMLA to pay your adviser(s) a one-off and/or an ongoing adviser service fee.

One-off adviser service fee

I/We consent for CMLA to deduct a one-off adviser service fee of \$ (please specify the total dollar amount) on (insert date). Any payments to financial advisers are in accordance with the arrangements we have with their dealer group. My financial adviser(s) and allocations are noted below.

Name of financial adviser	Allocation of dollar amount*
1.	
2.	

* Only required if the payment is to be split between two financial advisers.

The amount nominated above should be deducted from my chosen investment option(s) as follows:

Investment option	One-off adviser service fee
NC – Cash (3NCS)	\$
NC – Global Fixed Interest (3NFI)	\$
NC – Conservative (3NCO)	\$
NC – Diversified (3NDI)	\$
NC – Balanced (3NBA)	\$
NC – Growth (3NGR)	\$
NC – Global Property (3NPR)	\$
NC – Australian Shares (3NAU)	\$
NC – International Shares (3NIN)	\$

Please note: where you do not indicate which investment option(s) the one-off adviser service fee is to be paid from, the amount will be deducted on a pro-rata basis.

Ongoing adviser service fee

I/We consent for CMLA to deduct an ongoing adviser service fee (as nominated below). Any payments to financial advisers are in accordance with the arrangements we have with their dealer group. My financial adviser(s) and allocations are noted below.

Name of financial adviser	Allocation of dollar or percentage amount*
1.	
2.	

* Only required if the payment is to be split between two financial advisers.

SECTION 5 — ADVISER SERVICE FEE(S) (CONTINUED)

The fixed or percentage amount should be deducted from my chosen investment option(s) as follows:

Investment option	Fixed amount to be paid monthly (\$)	or	Percentage amount (% p.a.)
NC – Cash (3NCS)	\$		%
NC – Global Fixed Interest (3NFI)	\$		%
NC – Conservative (3NCO)	\$		%
NC – Diversified (3NDI)	\$		%
NC – Balanced (3NBA)	\$		%
NC – Growth (3NGR)	\$		%
NC – Global Property (3NPR)	\$		%
NC – Australian Shares (3NAU)	\$		%
NC – International Shares (3NIN)	\$		%

SECTION 6 - FINANCIAL ADVISER USE ONLY

Please note: all advisers to sign.

Name of financial adviser 1

Financial adviser number AFSL number

Company name of financial adviser (if applicable)

Contact name

Telephone work

Mobile

Facsimile

Name of financial adviser 2

Financial adviser number AFSL number

Company name of financial adviser (if applicable)

Contact name

Telephone work

Mobile

Facsimile

Customer Contact

If required, do you give us permission to contact the Bond Owner(s) direct to clarify any necessary matter? No Yes

Financial adviser declaration

- I certify that I have provided the Bond Owner(s) with the Investment Growth Bond PDS with a date of 31 July 2015.
- I certify that the adviser sections of the relevant Identification and Verification form for all Bond Owner(s) have been completed.
- Where any Adviser Service Fee(s) has been noted in Section 5, I certify that I am able to set up this Adviser Service Fee arrangement with the Bond Owner(s) and that they have agreed to this arrangement and that I have read and understood page 22 of the PDS (Adviser Service Fees).

Signature of financial adviser 1

Date

Signature of financial adviser 2

Date

SECTION 7 — INVESTOR'S DECLARATION

This section must be completed in all circumstances.

- I believe that I have obtained all information sufficient to explain the investment objectives, the risk and effect of each investment option chosen.
- I declare that if this Change of Details form is signed under a Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with the Change of Details form).

Bond Owner's signature

Date

Joint Bond Owner's signature (if any)

Date

If investor is a company, then this must be signed by an authorised officer (e.g. Director, Company Secretary).

Please mail this application to:
Investment Growth Bond - Life New Business
PO Box 320, Silverwater NSW 2128