

# Investment Bond Beneficiary Nomination Form

Please download and save this form prior to completing online. Please use **CAPITAL** letters if handwriting. We recommend you read and retain the current Investment Bond Product Disclosure Statement prior to completing this form.

## Part 1: Investor Details

Member Number:

### Investor 1

Title:  Mr  Mrs  Ms  Miss Other:

First Name:  Middle Name:

Last Name:

Date of Birth:

Street Address:

Suburb:

State:    Postcode:

Country:   
(If other than Australia)

Email:

Contact Number:

### Investor 2 (if applicable)

Title:  Mr  Mrs  Ms  Miss Other:

First Name:  Middle Name:

Last Name:

Date of Birth:

Street Address:

Suburb:

State:    Postcode:

Country:   
(If other than Australia)

Email:

Contact Number:

## Part 2: Investor Nomination of Intent

By selecting one of the following options I confirm my consent to a:

- New nomination of beneficiaries detailed in Part 3.
- OR
- Replacement of previously nominated beneficiaries, with the new nominated beneficiaries detailed in Part 3.
- OR
- Removal of all previously nominated beneficiaries (proceed to Part 4).

### Part 3. Nomination of Beneficiaries

Total benefit must equal 100%

#### Beneficiary 1

% of Benefit:    %

Title:  Mr  Mrs  Ms  Miss Other:

First Name:  Middle Name:

Last Name:  Date of Birth:

Street Address:

Suburb:  State:

Postcode:     Country (If other than Australia):

Email:  Contact Number:

#### Beneficiary 2

% of Benefit:    %

Title:  Mr  Mrs  Ms  Miss Other:

First Name:  Middle Name:

Last Name:  Date of Birth:

Street Address:

Suburb:  State:

Postcode:     Country (If other than Australia):

Email:  Contact Number:

#### Beneficiary 3

% of Benefit:    %

Title:  Mr  Mrs  Ms  Miss Other:

First Name:  Middle Name:

Last Name:  Date of Birth:

Street Address:

Suburb:  State:

Postcode:     Country (If other than Australia):

Email:  Contact Number:

If you require further nominations please duplicate this page and complete.

## Part 4. Investor signature(s)

### I/We note:

- If you have elected to remove all of your previously nominated beneficiaries, upon the death of the life insured, all proceeds will be transferred to the Policy Owner(s) or their estate.
- This nomination is valid only after it is registered by Foresters Financial.
- A confirmation of the nomination will be forwarded by email to the Policy Owner.
- Beneficiary(s) can be changed at any time during the policy tenure by submitting the completed Investment Bond Beneficiary Nomination Form to Foresters Financial.

### Signature of Investor 1

### Full name of Investor 1

Date:

D	D	M	M	Y	Y	Y	Y
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### Signature of Investor 2 (if applicable)

### Full name of Investor 2 (if applicable)

Date:

D	D	M	M	Y	Y	Y	Y
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### RETURN BY EMAIL

Ensure to include identification documents where relevant to:  
***service@forestersfinancial.com.au***

OR

### RETURN BY POST

Ensure to include identification documents where relevant to:

**PO Box 7702  
Melbourne VIC 3004**

Our privacy policy covers how we handle your personal information and is available at [www.forestersfinancial.com.au/privacy](http://www.forestersfinancial.com.au/privacy) or by calling us on 1800 645 326