

# INVESTMENT BOND FOR BEQUESTS

## How to Guide

FORESTERS  
FINANCIAL



## How to apply

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To assist you in completing your Application, you will need the following:

1. **Certified copies of identity documents**

All applicants need to provide identification as per requirements found in Part 5. A certified copy is a document that has been verified by someone with the legal authority ([www.justice.vic.gov.au/certifiedcopies](http://www.justice.vic.gov.au/certifiedcopies)) to say it is a true and correct copy of the original document. The certifier needs to see the original document along with the copy. They will examine the copy, then stamp and sign it Verified. Proof of identify documents that have been certified and copied are to be attached/emailed with your Application Form.

2. **If acting as a Power of Attorney (POA)**, please provide a certified copy along with the Application Form to Foresters Financial.

## Completing your Online Application

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	Requirement
Part 1: Investor(s) Details	Details of applicant(s). This can be individual and/or joint investors.
Part 2: Foundation Plus	This feature is not applicable to a Bequest bond as it is used to transfer an Investment Bond to a nominated child when they reach a specified age.
Part 3: Power of Attorney Details	Only applicable if you require correspondence sent to a different person other than the Investor's details captured in Part 1, Section A.
Part 4: Life Insured	An Investor or Joint Investor can select a Life Insured, upon whose death the Investment Bond matures. Once this is selected it cannot be changed.
Part 5: Verification and Proof of Identity	Verification process as per Anti-Money Laundering and Counter Terrorism Financing Act 2006 (AML/CTF Act) (Cth) requirements.
Part 6: Nomination of Beneficiaries	This is where you can nominate a beneficiary(s) to receive the proceeds of the investments after the death of the last surviving Life Insured. Please ensure you have the correct entity details in the case of a charity.
Part 7: Investment and Contribution Application	Section A: Initial contribution amount and specification of how you wish to invest in each investment option. Please note investment options will be processed using the unit price as at the close of business on the day the funds are received.  Section B: Regular Savings Plan (optional). If required, the Direct Debit Request Form will also need to be completed.
Part 8: Taxation Information	Each individual investor is required to complete as per Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS).
Part 9: Declaration and Signature(s)	Privacy statement, declaration and signature(s) requirements.
Direct Debit Request Form and Service Agreement	If needed, this is for those wanting to set up to contribute ongoing via a direct debit with a bank account.