





**Beneficiary 1**

Title Mr  Mrs  Ms  Miss  Other (please specify)

Given names

Surname

**Beneficiary 2**

Title Mr  Mrs  Ms  Miss  Other (please specify)

Given names

Surname

If there are more beneficiaries, please provide details on a separate sheet.

**1D. TRUSTEE DETAILS (ONLY COMPLETE IF "OTHER TRUST TYPE" IS SELECTED IN STEP 1B)**  
**Do not complete if the trust is a registered managed investment scheme, regulated trust (eg. SMSF) or government superannuation fund.**

How many trustees are there?

Please provide full name and address of each trustee below.

**Trustee 1**

Title Mr  Mrs  Ms  Miss  Other (please specify)

Given names

Surname

Residential address (not PO Box)

Suburb

State  Postcode

Country

**Trustee 2**

Title Mr  Mrs  Ms  Miss  Other (please specify)

Given names

Surname

Residential address (not PO Box)

Suburb

State  Postcode

Country







### 3. TRUST DECLARATION

I/We have no reason to suspect that the deposit lodged with the application or any subsequent deposits are or will be derived from or related to any money laundering, terrorism financing or other illegal activities.

I confirm that a Lifeplan Customer Identification for Individuals and Sole Traders form has also been completed for each Individual trustee listed.

I confirm that a Lifeplan Customer Identification for Companies form has also been completed for each Australian Company trustee listed.

A certified copy of each document is to be attached to this completed form (do not send originals). Each page of a copy must be certified as a true copy. Please sign here confirming that all information being forwarded is correct.

Signature

Date

#### Persons who may certify documents (Not for broker use. Brokers go to step 4.)

A certified copy means a document that has been certified as a true copy of an original document by one of the following persons:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described).
- A judge of a court or a magistrate.
- A chief executive officer of a Commonwealth court.
- A registrar or deputy registrar of a court.
- A Justice of the Peace.
- A notary public (for the purposes of the Statutory Declaration Regulations 1993).
- A police officer.
- An agent of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public.
- An officer with 2 or more continuous years of service with one or more financial institution (for the purposes of the Statutory Declaration Regulations 1993).
- An officer with, or authorised representative of, a holder of an Australian financial services license, having 2 or more continuous years of service with one or more licensees.
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.

#### The certifier must:

**X Write the following wording, or similar, on the copy of your documents:**

Example, for identity verification documents that contain a photograph of you "I certify that I have seen the original documentation and that the photograph is a true likeness and this copy is a complete and accurate copy of that original."

Example, for other identity verification documents "I certify that I have seen the original documentation and this copy is a complete and accurate copy of that original."

**X Sign and date each page of the photocopy.**

**X Add their name in block capitals along with their position/capacity, address and daytime contact telephone number (not a mobile phone). The certifier may be contacted by Lifeplan.**

**X Add the official stamp of their office, if possible.**



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**Customer Service Telephone** 1300 1300 38 **Email** [enquiries@lifeplan.com.au](mailto:enquiries@lifeplan.com.au) **Website** [lifeplan.com.au](http://lifeplan.com.au) **Adviser Website** [advisers.lifeplan.com.au](http://advisers.lifeplan.com.au)

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Lifeplan Australia Building Society Limited ABN 30 087 652 079 AFS Licence 237994

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