

# Change to Account-holder/ Customer Records Form

Please phone the Customer Service Team on 1300 1300 38 if you have any questions.  
Please **PRINT** clearly in **Black pen** keeping well within the boxes.  
Start at the left, write one letter in each box and leave one box between words.  
Use crosses in the boxes marked with an 'X'.

## Step One Your Details

Surname

First Name(s)

Address

Suburb

State

Postcode

Phone

## Step Two New Name Details

New Surname/s

Only complete  
if name changed

First Name/s

Attach a copy of  
proof of name change

Old signature

New signature

## Step Three New Address Details

New Residential  
Address

Suburb

State

Postcode

Telephone Numbers

Home

Business

Mobile

## Step Four Signature

Signature

Signature

Issued by



For enquiries please call 1300 1300 38

Lifeplan Funds Management is a business name of  
Lifeplan Australia Friendly Society Ltd. ABN 78 087 649 492 AFSL 237987  
Lifeplan Australia Building Society Ltd. ABN 30 087 652 079 AFSL 237994  
111 Gawler Place, Adelaide SA 5000

## Office Use Only

ALL systems must be checked and altered where appropriate and forwarded to relevant Business Unit/s.

**FACTS**

<b>LABS</b>	Yes / No	Account Number/s	

Savings Accounts	
Loan Accounts	

Altered on	/ /	By	
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<b>LAFS</b>	Yes / No	Member Number/s	

Loan Accounts			
Altered on	/ /	By	

**Important**

- Check single and joint account-holder / membership
- If there is an S6, S7, S8 or L account this document including a proof of name change if applicable must be forwarded to the Lending Department

<b>SAM</b>	Yes / No	Altered by	/ /
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<b>PRINCIPAL</b>	Yes / No	Altered by	/ /
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Confirmation Sent Yes / No

<b>GLOBE</b>	Yes / No	Altered by	/ /
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<b>OPT IN</b>	Yes / No	Altered by	/ /
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### Lending Department Office Use

Borrower Screen	Yes / No	Altered by	/ /
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New Signature Noted	Yes / No	Altered by	/ /
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Borrower Screen	Yes / No	Altered by	/ /
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