

# Lifepan NextGen Investments Nomination of Beneficiary



Please phone the Customer Service Team on 1300 130 038 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".

## 1. YOUR DETAILS

Surname

First name(s)

Address

Suburb

State  Postcode

Phone  Mobile phone

## 2. NOMINATION OF BENEFICIARIES INCLUDING WEALTH PRESERVER FEATURE (OPTIONAL)

If you wish to nominate a beneficiary, then you must also be the Life Insured. For joint applications, all joint ventures must be the Lives Insured. A beneficiary can be a natural person of any age, a company or a trust. A Wealth Preserver beneficiary must be a natural person. I/We nominate the following person(s) to receive the proceeds of any death benefit in the event of the death of the last surviving Life Insured, in accordance with my instructions specified below, the PDS and the Constitution of Lifepan.

Title  Mr  Mrs  Ms  Miss  Other

Surname

First name(s)

Residential address

Suburb

State  Postcode  Proportion of proceeds  %

Date of birth

Relationship to investor

### Wealth Preserver instructions for Beneficiary 1 (optional)

Do you wish to activate NextGen Wealth Preserver for this beneficiary?  
If you have answered NO to the question above then please proceed to STEP 3.

### Annual Benefit Entitlement (for Beneficiary 1)

Pay my beneficiary the Annual Benefit Entitlement specified below:

1. A fixed dollar amount of \$  per annum, or
2.  % of my beneficiary's NextGen Wealth Preserver investment balance per annum.
3. A lump sum payment of \$

### Benefit Payment Commencement Date (for Beneficiary 1)

The benefit payments to your beneficiary will commence on the latter of the start date of your beneficiary's NextGen Wealth Preserver investment or on the date of your beneficiary's 16th birthday, unless you specify a later date. Indicate below if you wish to specify a later benefit payment commencement date. I/We authorise that benefit payments to my beneficiary are to commence on:

e.g. "on my beneficiary's 21st birthday", "on the 10th anniversary of my death"

The benefit is to be payable into the Australian financial institution account maintained by my beneficiary every:

Fortnight  Month  Quarter  Half-Year  Year  Once off



**Child Beneficiaries (for Beneficiary 1)**

Specify how you want your death benefit to be distributed in the following circumstances (complete both 1 and 2).

- 1. In the event my/our nominated beneficiary is aged between 10 and under 16 at the date of the death of the last surviving Life Insured and a parent's or guardian's signature is not provided to Lifeplan within 12 months of that death, I/we authorise Lifeplan to pay the death benefit which would have been transferred to my/our beneficiary's NextGen Wealth Preserver to:

The estate of the last surviving Life Insured  My beneficiary

- 2. In the event my/our nominated beneficiary is aged less than 10 at the date of the death of the last surviving Life Insured I/we acknowledge that NextGen Wealth Preserver will not be activated and I/we authorise Lifeplan to pay the death benefit which would have been transferred to my/our beneficiary's NextGen Wealth Preserver to:

The estate of the last surviving Life Insured  My beneficiary

Title  Mr  Mrs  Ms  Miss  Other

Surname

First name(s)

Residential address

Suburb

State  Postcode

Date of birth

Relationship to investor



**Wealth Preserver instructions for Beneficiary 2 (optional)**

Do you wish to activate NextGen Wealth Preserver for this beneficiary?  
If you have answered NO to the question above then please proceed to STEP 3.

**Annual Benefit Entitlement (for Beneficiary 2)**

Pay my beneficiary the Annual Benefit Entitlement specified below:

- 1. A fixed dollar amount of \$  per annum, or
- 2.  % of my beneficiary's NextGen Wealth Preserver investment balance per annum.
- 3. A lump sum payment of \$

**Benefit Payment Commencement Date (for Beneficiary 2)**

The benefit payments to your beneficiary will commence on the latter of the start date of your beneficiary's NextGen Wealth Preserver investment or on the date of your beneficiary's 16th birthday, unless you specify a later date. Indicate below if you wish to specify a later benefit payment commencement. I/we authorise that benefit payments to my beneficiary are to commence on:

e.g. "on my beneficiary's 21st birthday", "on the 10th anniversary of my death"

The benefit is to be payable into the Australian financial institution account maintained by my beneficiary every:

Fortnight  Month  Quarter  Half-Year  Year  Once off





**Wealth Preserver declaration (only if the feature has been activated)**

- The first benefit payment is due on the benefit commencement date (determined in accordance with my/our instructions above) and thereafter in accordance with the specified payment frequency.
- If the benefit payment commencement date is not a business day, benefit payments will commence on the next business day.
- Benefit payments are subject to the minimums specified by Lifeplan from time to time.
- The start date of my/our beneficiary's NextGen Wealth Preserver investment is the date when Lifeplan transfers funds into the investment which will occur only after Lifeplan has received official notification of the death of the last surviving Life Insured and after they have verified the eligibility of my/our nominated beneficiary.
- If the specified benefit payment commencement date is before the start date of my/our beneficiary's NextGen Wealth Preserver Investment or the date of my/our beneficiary's 16th birthday, the benefit payment commencement date will default to the later of these two dates.

**3. DECLARATION AND SIGNATURE**

I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained for future references. Please retain a copy of this form for your files.

Investor

Print name(s)

Date

