



Child Beneficiaries (for Beneficiary 1)

Specify how you want your death benefit to be disbursed 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 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

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 Next Gen Wealth Preserver to

The estate of the last surviving Life Insured My beneficiary

Nomination of Beneficiary 2

Title Mr Mrs Ms Miss Other

Surname

First Name(s)

Residential Address

Suburb

State Postcode Phone

Date of Birth DDMMYYYY

Relationship to investor Proportion of Proceeds %

Wealth Preserver instructions for Beneficiary 2 (optional)

Do you wish to activate NextGen Wealth Preserver for this beneficiary? NO YES

If you have answered NO 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.

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 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:

[Blank box for commencement date]

e.g. "on my beneficiary's 21st birthday", "on the 19th anniversary of my death".

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

Fortnight Month Quarter Half-Year Year

*Ensure that total "proportion of proceeds" payable to all beneficiaries is equal to 100%

Please conclude completing this form on the next page



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.

Step 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 reference.

Investor

Date

Investor

Date

Issued by



Lifeplan Funds Management is a business name of Lifeplan Australia Friendly Society Ltd.
ABN 78 087 649 492 AFSL 237989

Return by Fax to:
Fax us the completed form on (08) 8212 2790

Return by Post to:
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