

Tax Minimiser Funeral Bond Application for Funeral Benefit



Please phone the Customer Service Team in 1300 133 285 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 Details of Deceased Investor

Step One Details of Deceased Investor

Name

Address

Suburb State Postcode

Policy Number

Step Two Details of Executor/Legal Personal Representative

Name

Address

Suburb State Postcode

Contact Phone

I am the representative responsible for the estate of the deceased investor. I hereby apply to Lifeplan Funds Management for the payment of the Funeral Bond benefits due on the death of the above named deceased investor. Please note that the proceeds of the Funeral Bond are used to pay funeral expenses. Any remaining are payable to the Estate.

I have enclosed the following:

- Certified copy of the Death Certificate
- Original Funeral Account/Receipt

Step Three Payment Details

Please select one of the following options (Note: payments will only be paid to the Estate or a Funeral Director):

- The funeral expenses have been paid by
Please forward a cheque made payable to the above named person, or pay directly into the following account:
Bank Name Branch
Branch Number (BSB) Account number
Account Name
- The funeral expenses have not been paid. Please forward a cheque for \$ to the funeral director at the address shown on the attached account.

Step Four Signature

Signature of Executor/Legal Representative

Date



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