

# Tax Minimiser Funeral Bond Application for Funeral Benefit



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 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 Number

I declare that 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 benefit due on the death of the above named deceased Investor. Please forward all related funeral expenses for consideration of payment.

I have enclosed the following:

- Original certified copy of the Death Certificate
- Original Funeral Account/Receipt (If already paid & reimbursement required)
- Other related funeral expenses for consideration of payment



## 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
- Please forward a cheque made payable to the Estate for the amount of \$
- Pay directly into the Estate's account:
  - OR 



 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

Name

Signature of Executor/Legal Personal Representative

Date

Note: Lifeplan collects the executor's/legal representative's personal information for the purpose of processing this claim. If you would like a copy of our privacy policy or want to access or change your personal details please call 1300 1300 38.

