

3. TRANSFER OF POLICY GUIDANCE NOTES

1. Two signed copies of this Memorandum of Transfer of Ownership form must be given to KeyInvest Ltd and after registration, one copy will be forwarded to the Transferee(s).
2. A customer Identification Form is attached with all identification supplied.
3. Upon the Date of Registration of the assignment, the Transferee(s) becomes the absolute owner of the Policy (multiple Transferees become joint Policy Owners).
4. By this assignment:
 - (a) the Transferee(s) becomes a Benefit Fund member(s) of those Benefit Funds referable to the Policy which is assigned, and the Transferor(s) ceases such membership.
 - (b) the Transferee(s) does not become a Company Member under the Company's Constitution; and
 - (c) any existing Nomination of Beneficiary(s) made in respect of the Policy is cancelled and revoked.
5. A Policy Owner (Transferor) must have reached aged 16. Note: A Policy Owner, once aged 16 has the same capacity to exercise rights and powers in respect of the Policy as an 18 year old Policy Owner(s).
6. A Transferee who is at least age 10, but has not reached 16 can take an assignment of the Policy only with the consent of a parent or a person who stands in place of a parent.

4. CONTACT US

Street Address: KeyInvest Ltd
Level 2, 49 Gawler Place
Adelaide SA 5000

Postal Address: KeyInvest Ltd
PO Box 3340
Rundle Mall SA 5000

Phone: 1300 658 904

Email: info@keyinvest.com.au

Web: www.keyinvest.com.au

Hours of operation: 8.30am - 5.00pm Adelaide (CST)

OFFICE USE ONLY

Date of Registration of Transfer by Keyinvest Ltd:

Customer identification verified by: Originals Certified copies Register search
 Customer identification documentation attached

Checking Officer's Name

Checking Officer's Signature

Date

Comments