

## ClearView TeleAccess Application

I wish to apply for use of the TeleAccess facility for my:

**Tick whichever applies**

- ClearView Superannuation and Roll-overs
- ClearView Pension Plan
- ClearView Savings Bond
- ClearView Roll-over Bond

**Please photocopy more forms if required.**

### Section A: Terms and conditions of TeleAccess

'We', 'our' or 'us' and ClearView means the Trustee and/or ClearView Life as relevant.

If you join TeleAccess the following Terms and Conditions apply:

- A withdrawal can only be paid to the financial institution account last nominated by you to us in writing. This account must be in your name or in joint names with you as one of the joint account holders.
- The confidentiality of the Security Access Number (SAN) is your responsibility and the SAN will be sent by post at your risk. You can telephone us to cancel the SAN but you must write in to us to be re-issued with a new SAN. We may ask for additional information other than the SAN before a transaction is processed but we may also choose not to require additional information.
- Under TeleAccess, access will be given to any person who uses the SAN and complies with any other security procedures that we apply from time to time. We will treat any instruction or request from that person as an instruction or request from you.
- ClearView Superannuation and Roll-overs investors who wish to use the facility to make additional investments over the phone need to complete the Direct Debit Form. ClearView Pension Plan, ClearView Roll-over Bond and ClearView Savings Bond investors cannot make additional investments over the phone. By completing a Direct Debit Form, you are authorising us to debit additional investments from your bank, building society or credit union account. You must allow 14 days for us to set up your direct debit. If there is not enough money in the account to meet a direct debit, some financial institutions will charge a dishonour fee. We will cancel any units issued and may also charge a fee for dishonoured direct debits.
- You may cancel your use of TeleAccess or change any of the details provided by you to us in relation to the facility by notifying us in writing.
- We may cancel or vary the terms of the facility by notifying you.
- We will not have any liability for any claims, costs or losses arising in connection with TeleAccess, including in connection with misuse of the SAN or other misuse of the facility. An investor who elects to use the facility indemnifies us against all claims, costs and losses of this type.

- Where ClearView Pension Plan investors use the TeleAccess facility to make partial withdrawals, benefits will be taken proportionally between tax-free and taxable components as determined at the commencement of your Pension Plan.
- You consent to our collection, use and disclosure of your personal information as set out in the Privacy and your personal information section.

### Section B: Investor details

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#### Investor 1

Mr  Mrs  Miss  Ms  Other

Surname

Given name(s)

Date of birth

 /  / 

Residential address

  


Postcode

Postal address (if different from above)

  


Postcode

Home phone number

 ( ) 

Work phone number

 ( ) 

#### Investor 2 If applicable (Savings Bond only)

Mr  Mrs  Miss  Ms  Other

Surname

Given name(s)

Date of birth

 /  / 

Residential address

  


Postcode

Postal address (if different from above)

  


Postcode

Home phone number

 ( ) 

Work phone number

 ( )

## Section C: TeleAccess Options

I would like to:

- Yes** Please complete your Australian Financial Institution Direct Debit Details in Section D.

> Make additional investments over the phone.  
(Not available for the ClearView Pension Plan or ClearView roll-over Bond or ClearView Savings Bond.)
- Yes** Please complete your Australian Financial Institution Details in Section D.

> Make partial withdrawals over the phone.  
\*Note this facility is not currently available for ClearView Superannuation and Roll-overs or ClearView Roll-over Bond customers
- Yes**

> Switch over the phone.

## Section D: Financial Institution account details

**Complete this section if you wish to make additional investments and/or withdrawals via TeleAccess as selected in Section C.**

### Request and authority to debit

**ClearView Life Assurance Limited ID 022829** may debit and/or charge any amount through the Bulk Electronic Clearing System, from the account nominated on this form. Each debit or charge must be effected according to the Direct Debit Request Service Agreement.

Name and address of financial institution

Postcode

### Details of account to be debited and/or credited

Name of account

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BSB number

Account number

: : : -	: : : : : : : :
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### Signature(s)

Before signing this section, please read the Direct Debit Request Service Agreement which has been given to you. Your signature(s) below will indicate you accept the terms of the Direct Debit Request Service Agreement and confirm that the details on this form have been checked and are correct.

If a joint account, please have all account holders sign. If the account is held by a company please have one director and the company secretary each sign.

If you are signing for and on behalf of another person or entity, please state the capacity in which you sign in the signature box below.

**Signature 1**

X
DATE / /

**Signature 2**

X
DATE / /

### Please note:

- > Direct debiting is not available on the full range of accounts.  
If in doubt, please refer to your financial institution.
- > Some financial institutions charge a dishonour fee if there is not enough money in the account to meet the direct debit.
- > We need at least seven business days written notice if you would like to change any of your payment details.
- > A fee may be charged to your account for use of the Direct Debit System. Ask your financial institution for details.

## Section E: Proof of Identity\*

- I have attached a certified copy of my driver's licence or passport.
- OR
- I have attached certified copies of both: Birth/ Citizenship Certificate or Centrelink Pension Card AND Centrelink Payment letter or Government notice (less than 1 year old) with name/address.

If you are unable to meet the above 'Proof of Identity' requirements please contact us on 132 977.

\* If you have already provided complying Proof of Identity documents in the past five years, you need not resubmit this information with your TeleAccess Application.

If the expiry date on any of your Proof of Identity documentation previously provided has expired, you will need to resubmit current Proof of Identity information.

## Section F: Individuals declaration and signature

I/We understand:

- > that if I/we do not provide all required information, my/our request will not be actioned;
- > my/our request will be deemed to be received and will be actioned on the day ClearView receives all required information.

I/We have read and agree to the terms and conditions of TeleAccess.

Signature 1

X

DATE / /

Signature 2

X

DATE / /

## Privacy and your personal information

We need to collect and use (and as necessary disclose) your personal information in order to provide and administer the TeleAccess facility. You can choose not to provide us with some or all of your personal information, but this may affect our ability to provide the facility.

By applying for the TeleAccess facility you agree that we can collect your personal information from, and disclose it on a confidential basis to: our related entities; your bank, building society or credit union; government departments and agencies; investigators; lawyers; advisers; and the agent of any of these.

## Our Privacy Policy

Further information on how we handle your personal information is explained in our Information Handling Policy including:

- > how to contact us regarding Privacy;
- > how to inform us to change your marketing consent; and
- > how to access your personal information.

You can obtain a copy of our Information Handling Policy by calling us on 1800 265 744 or by visiting our website at [www.clearview.com.au](http://www.clearview.com.au)

## Direct Debit Request Service Agreement

### Definitions

**account** means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

**agreement** means this Direct Debit Request Service Agreement between you and us.

**business day** means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

**debit day** means the day that payment by you to us is due.

**debit payment** means a particular transaction where a debit is made.

**Direct Debit Request** means the Direct Debit Request Service Agreement between us and you.

**us or we or our** means ClearView Life Assurance Limited,

(who trades as Clearview Life, the Administrator of the Clearview Retirement Plan and acting on behalf of Clearview Life Nominees Pty Limited who is the Trustee of the Plan), the Debit User you have authorised by signing a Direct Debit Request Service Agreement.

**you** means the customer(s) who signed the Direct Debit Request.

**your financial institution** is the financial institution where you hold the account that you have authorised us to arrange to debit.

## 1. Debiting your account

- 1.1 By signing a Direct Debit Request, you have authorised us to arrange for the funds to be debited from your account. You should refer to the Direct Debit Request and this agreement for the terms of the agreement between us and you.
- 1.2 We will only arrange for funds to be debited from your account:
  - (a) as authorised in the Direct Debit Request; and/or
  - (b) if we have sent to the address nominated by you in the Direct Debit Request, a billing advice which specifies the amount payable by you to us and when it is due.
- 1.3 If the debit day falls on a day that is not a business day, we may direct your financial institution to debit your account on the following business day. If you are unsure about which day your account has or will be debited, please check with your financial institution.

## 2. Changes by us

- 2.1 We may vary any details in this agreement or a Direct Debit Request at any time by giving you at least 14 days written notice.

## 3. Changes by you

- 3.1 Subject to 3.2 and 3.3, you may change the arrangements under a Direct Debit Request by contacting us on 132 977.
- 3.2 If you wish to stop or defer a debit payment you must notify us in writing at least 7 business days before the next debit day or alternatively, you may arrange it through your financial institution.
- 3.3 You may also cancel your authority for us to debit your account at any time by giving us 14 business days notice in writing before the next direct debit day. This notice should be given to us in the first instance or alternatively, you can arrange it through your financial institution.

## 4. Your obligations

- 4.1 It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the Direct Debit Request.

- 4.2 If there are insufficient clear funds available in your account to meet a debit payment:
- (a) you may be charged a fee and/or interest by your financial institution;
  - (b) you may also incur fees or charges imposed or incurred by us; and
  - (c) you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.
- 4.3 You should check your account statement to verify that the amounts debited from your account are correct.
- 4.4 If ClearView Life Assurance Limited is liable to pay goods and services tax (GST) on a supply made in connection with this agreement, then you agree to pay ClearView Life Assurance Limited on demand an amount equal to the consideration payable for the supply multiplied by the prevailing GST rate.

## 5. Dispute

- 5.1 If you believe there has been an error in debiting your account, you should notify us on 132 977 and confirm that notice in writing with us as soon as possible so that we can resolve your query quickly.
- 5.2 If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.
- 5.3 If we conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding.
- 5.4 Any queries you may have about an error made in debiting your account should be directed to us in the first instance so that we can attempt to resolve the matter between us and you. If we cannot resolve the matter you can still refer it to your financial institution which will obtain details from you of the disputed transaction and may lodge a claim on your behalf.

## 6. Accounts

- 6.1 You should check:
- (a) with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions;
  - (b) your account details that you have provided to us are correct by checking them against a recent account statement; and
  - (c) with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.

## 7. Confidentiality

- 7.1 We will keep any information (including your account details) in your Direct Debit Request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.
- 7.2 We will only disclose information that we have about you:
- (a) to the extent specifically permitted by law; or
  - (b) for the purposes of this agreement (including disclosing information in connection with a query or claim).

## 8. Notice

- 8.1 If you wish to notify us in writing about anything relating to this agreement, you should call 1800 265 744 to obtain our appropriate mailing address and/or fax number.
- 8.2 We will notify you by sending a notice in the ordinary post to the address you have given us in the direct debit request.
- 8.3 Any notice will be deemed to have been received two business days after it is posted.



This form can be posted (no stamp required) to:

**ClearView**  
Client Operations  
Reply Paid 4232 – GPO Box  
Sydney NSW 2001



If you have any questions about this form,  
please call us on

**132 977**