

Family Fee Rebate Election form

Use this form to request your investments to be counted for the purposes of the Family Fee Rebate. Please complete this form using **black ink** and print clearly within the boxes in **CAPITAL LETTERS**. Start at the left of each answer space and leave a gap between words. Please **CROSS X** appropriate answer boxes. Fields marked with an asterisk (*) must be completed in order for us to action your request.

Note: Applicable Family Members include your father/mother, son/daughter, sister/brother, spouse (married and defacto). Only investments in ClearView Pension Plan, Superannuation and Roll-overs and Managed Investments can be included.

A. Member details

*My account number / (e.g. TSUP / 100000)

*Title Mr Mrs Ms Miss Dr Other *Gender Male Female *Date of birth

*Given name(s) *Surname

*B. Investments held by your applicable family member(s)

Product name	Account number	Member/Investor name	Date of birth	Relationship to you
Example: ClearView Pension Plan	TPEN/100000	Mr A Citizen	17/02/1971	Spouse

C. Declaration

By signing this request form, I am making the following statements:

- I declare that all the details given in this form are true and correct;
- I declare that, if signing under a power of attorney, I verify that, at the time of signing, I have not received a notice of revocation of that power.

We are committed to handling your personal information and sensitive information in a secure manner and in accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy, please visit www.clearview.com.au.

Signature of member/investor

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Member/investor full name (print clearly in block letters)

Sending your form

Please send the form to us via email or mail.

Mailing address:

**ClearView Wealth
Reply Paid 4232
Sydney NSW 2001**

Email address:

client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.

ClearView Superannuation and Roll-overs and ClearView Pension Plan are issued by ClearView Life Nominees Pty Limited ABN 37 003 682 175 AFSL 227683 RSE Licence No L0000802 as Trustee for the ClearView Retirement Plan ABN 45 828 721 007 RSE Registration No R1001624. ClearView Rollover Bond is issued by ClearView Life Assurance Limited ABN 12 000 021 581 AFSL 227682.