

ANNEXURE OF ASSIGNMENT



Policy number

Please use **BLOCK LETTERS**.

Instructions

This form can be used when assigning ownership of a policy from one individual or entity to another.

The person/s signing as transferor must be the current owner/s of the policy, and the person/s signing as transferee must be the proposed new owner/s of the policy.

This form cannot be used if:

- the current policy owner is a superannuation trustee but the proposed new policy owner is not, or
- the current policy owner is not a superannuation trustee but the proposed new policy owner is.

(However, it may be used if the current policy owner is a superannuation trustee and the proposed new policy owner is the life insured, and the trustee has determined that the life insured has met an appropriate condition of release under superannuation legislation.)

Important Information

The assignment of policy ownership is not valid until registered by TAL Life Limited.

Once the assignment has been registered, we will provide a new policy schedule to the transferee, and all communications about the policy will be sent to the transferee. The transferee will be the absolute owner of the policy and will have all the rights and powers, and be subject to all the liabilities, of the transferor under the policy, and they may sue in their own name under the policy. Payment to the transferee of money due under the policy will discharge us from all liability under the policy in respect of that money.

TAL Life Limited bears no responsibility for any consequences of an assignment of policy ownership, and the transferor should consider if they require any legal, tax or financial product advice in relation to the assignment before executing this document.

Section A

Date of transfer

/ /

Transferor (existing owner/s)

Name in full

Signature of transferor (existing owner/s)

X

X

Witness signature

X

Section B

Transferee (new owner/s)

Name in full

Occupation of Transferee

Address

Date of birth (if applicable)

/ /

Signature of transferee (new owner/s)

X

X

Witness signature

X

Section C

I have enclosed the original Policy Document and Schedule:

Yes No

If 'Yes', the original Policy Document and Schedule can only be accepted by post and not via email.

If 'No', complete the Lost Policy Statutory Declaration over the page.

Office use only

Date of registration of transfer by company

/ /

Policy number following assignment (if applicable)

Due to administrative reasons it may be necessary to allocate a new policy number following registration of the transfer of ownership of the policy. The new policy number will be displayed here when the Annexure of Assignment is returned to you.

Signature of principal officer of company or authorised person

X

Please note upon transfer of ownership, any Adviser Service Fee payments currently facilitated by TAL Life on behalf of the transferor will cease. If you have any queries about completing this form please call Life Customer Service on 1800 221 727.

The completed form may be posted to GPO Box 68, Sydney NSW 2001 or emailed to life_customerservice@asteronlife.com.au

If you have answered 'Yes' in Section C, the original Policy Schedule and Document must be sent via post and not via email.

TAL Life Limited ABN 70 050 109 450 AFSL 237848 (TAL Life) is part of the TAL Dai-ichi Life Australia (TAL) group of companies. TAL Life is the issuer of ordinary Asteron Life products and the insurer for Asteron Life products held in superannuation, which are issued by LGIAsuper Trustee ABN 94 085 088 484 AFSL 230511 as trustee for LGIAsuper ABN 23 053 121 564 RSE R1000160, trading as Brighter Super (Brighter Super). The different entities of the Brighter Super Group and TAL Group do not guarantee, are not responsible for, or liable in respect of, products and services provided by the other.

STATUTORY DECLARATION FOR ISSUE OF SPECIAL POLICY



Policy owner details

I
of in the state of

Do solemnly and sincerely declare

1. That I am the policy owner of policy number (herein called the policy) on the life of issued by TAL Life Limited.
2. **That** the policy was never received.
That the policy has been lost or destroyed.
(Please delete the sentence that does not apply)
3. That I have made a thorough search for the policy without trace.
4. **That** I have satisfied myself by extensive enquiry that none of the members of my family have any knowledge of the whereabouts of the policy and I have also ascertained that it is not held by my bank, solicitor, accountant, attorney or any other personal representative.
5. **That** I have not assigned, mortgaged or otherwise dealt with the policy in any way and that no person holds a lien over it.
6. **That** should the policy come into my possession it shall immediately be handed to the Company.
7. **That**, pursuant to the Provisions of Section 221 of the Life Insurance Act, 1995, a Special Policy be issued in substitution for the policy numbered above.

AND I MAKE this solemn declaration by virtue of the Statutory Declarations Act 1959 and subject to the penalties provided by that Act for the making of false statements in Statutory Declarations, conscientiously believing the statements contained in this declaration to be true in every particular.

Declared at

(Suburb) in the state of

Signature of policy owner

Date / /

Before me

(To be signed before a Magistrate, Justice of the Peace, Commissioner for Affidavits, Notary Public or Commissioner for declarations)

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