



Adviser Transfer Request Form

Please complete this form so we can transfer your policy/ies to a new adviser.

Policy Owner Details

Policy Owner Name:	<input type="text"/>		
Contact Number:	<input type="text"/>	Date of Birth:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Email Address:	<input type="text"/>		

Policy Transfer Details

Policy Number	Life Insured's Name	Life Insured's Date of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

New Adviser Details (if known)

Adviser Name:	<input type="text"/>	Adviser ID:	<input type="text"/>
Contact Number:	<input type="text"/>	Fax Number:	<input type="text"/>
Email Address:	<input type="text"/>		

☐ I do not have an adviser and would like assistance finding an adviser. By ticking this box I agree to be contacted by AIA Australia.

Privacy

I have read and consent to the handling, collection, use and disclosure of my personal and sensitive information in the manner described in the Declaration section of this form and the AIA Australia Privacy Policy available at www.aia.com.au as updated from time to time, including the exchange of information with third parties located in Australia and overseas. I agree that any personal and sensitive information AIA Australia holds will be governed by the most current Privacy Policy held on AIA Australia's website.

Policy Owner Declaration and Signature

I have informed my existing adviser of my decision to change advisers and understand once the adviser transfer is complete, my existing adviser:

- will not have access to my policy/ies;
- will not need to review my cover based on my needs;
- will not be remunerated for my policy/ies by AIA Australia.

I understand I should seek advice in line with my changing needs and my new adviser may:

- have access to my policy/ies;
- be provided with information in relation to my policy/ies;
- receive remuneration in relation to my policy/ies.

Policy Owner Name	Policy Owner Signature	Date Request Signed
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Policy Owner Name	Policy Owner Signature	Date Request Signed
<input type="text"/>	<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>