



Guaranteed Annuities Lifestream Guaranteed Income

NOMINATED BENEFICIARY FORM

Instructions/information on how to complete this form

- Please complete this form using BLACK or BLUE INK in CAPITAL LETTERS. Mark appropriate answer boxes with a tick (✓).
- This form is applicable for annuities purchased with personal savings only. Not applicable for lifetime annuities or annuities purchased with super.

Section 1 – Policy owner details

Policy number

Policy Owner

Title Mr Mrs Ms Miss Other ▶

Given name(s)

Surname

Address

State Postcode Country

Date of birth

Email

Joint Policy Owner

Title Mr Mrs Ms Miss Other ▶

Given name(s)

Surname

Address

State Postcode Country

Date of birth

Email

Section 2 – Amending beneficiary nomination

I wish to: please indicate (✓)

 Cancel all current beneficiary nominations for this policy To make a new nomination or amend/delete an existing nomination, please complete the table below and ensure that your new nomination split adds up to 100%.

Nomination

Nominated beneficiary first name and surname	Date of birth	Gender	Existing split %	New split %
1.				
2.				
3.				
4.				
5.				
6.				
			100%	100%

Section 3 – Beneficiary nomination rules (personal savings only)

Your nomination is subject to the following rules:

- A nominated beneficiary must be a natural person;
- Conditional nominations cannot be made;
- You may change a nominated beneficiary or revoke a previous nomination at any time;
- A nominated beneficiary is not applicable for superannuation monies, Lifetime Income Annuities and policies owned by Australian companies, trusts or funds;
- A nominated beneficiary has no rights until the policy ownership is transferred upon death of the policy holder;
- Reversionary beneficiaries may not be altered once the Annuity commences.

Section 4 – Declaration

I declare:

1. All answers given on this form are true and correct.
2. I understand that I indemnify AIA Australia Limited ABN 79 004 837 861 AFSL 230043 (AIA Australia) against any liabilities whatsoever arising out of it acting on any of these details provided by me in connection with this form.
3. I understand that this nomination:
 - a. will apply to my Policy with AIA Australia until cancelled by me/us in writing
 - b. where indicated replaces any previous nomination made to AIA Australia; and
 - c. may be cancelled at any time in writing by AIA Australia.
4. If this form is signed under a Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that Power. A certified copy of the Power of Attorney should be submitted with this form unless already sighted by AIA Australia.

Signature of Policy Owner

Date

Signature of Joint Policy Owner

Date

Post

AIA Australia Guaranteed Annuities
GPO Box 3306
Sydney NSW 2001

ePost (adviser use only)

Scan and email form to:
service@cba.com.au