

Ordinary redemption form

This form is to be used when redeeming benefits from an ordinary (non superannuation) product.



1 Investment details

Zurich investment number

Zurich investment type

Investor / Policyowner 1 details (or company details)

Title Surname

Given name(s) Date of birth / /

Note: Please attach evidence such as a certified copy of a marriage certificate to verify any name change.

Residential address State Postcode

Postal address (if different to above) State Postcode

Contact details Work () Home ()

Mobile Email

2 Investor / Policyowner 2 details (or company details)

Title Surname

Given name(s) Date of birth / /

Note: Please attach evidence such as a certified copy of a marriage certificate to verify any name change.

Residential address State Postcode

Postal address (if different to above) State Postcode

Contact details Work () Home ()

Mobile Email

3 Redemption transfer amount

Total withdrawal value \$ (approximate)

Please provide your original policy document if you are redeeming the full withdrawal value of your policy.

Partial withdrawal value \$

4 Payment details

- Cheque made payable to you
- Direct credit payment to an Australian bank account in your name or a joint account where you are an account holder

Direct credit details

Please provide the bank account details where you would like the funds to be deposited:

Name of financial institution

Address

State

Postcode

Account name

Bank/State/Branch (BSB number) - Account number

Please check with your bank or financial institution that the account details are correct. Incorrect information can result in payment to the wrong account. Zurich is not responsible for funds paid to the wrong account on your instruction.

5 Insurance cover

Important: If you are redeeming the full value of this policy and have life insurance attached, please note your life insurance will not automatically continue. The continuation of your insurance will depend on the terms and conditions of any existing cover. If you wish to maintain your life insurance coverage, please contact the Customer Care team on 131 551, who will evaluate your eligibility and inform you of the options available to you.

6 Declaration and discharge

I/we:

- agree that where the redemption represents a full redemption, the payment of the benefit in accordance with my/our instructions constitutes a full and effective discharge from Zurich Australia Limited ('Zurich') of all its obligations under the policy;
- have enclosed the original policy documents issued by Zurich with this form or I/we declare that the original policy document has been lost, destroyed or not received, and that a diligent search has failed to locate it;
- I/we declare that I am/we are legally entitled to make the withdrawal from my/our Policy. I/we hereby indemnify Zurich against any and all claims relating to reliance on the information provided;
- declare that I/we have not assigned or mortgaged this policy nor has it has been pledged as security for any loan;
- agree that should the original policy document subsequently be found, I/we shall immediately notify Zurich, and return it for cancellation; and
- I/we acknowledge consent to the collection, use, storage and disclosure of my/our personal information (including any sensitive information) as described in the Zurich Privacy Policy and the Privacy Statement which is available at www.zurich.com.au or by calling Zurich's Customer Care team on 131 551.

Investor / Policyowner 1 signature

Date

X

/ /

Investor / Policyowner 2 signature

Date

X

/ /

Your Privacy

Zurich is bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing us with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. For a more detailed explanation of Zurich's Privacy Policy, or to obtain a copy of Zurich's Privacy Policy, please visit our website at www.zurich.com.au or contact the Zurich Privacy Officer on 132 687 or email us at privacy.officer@zurich.com.au.

Any questions? Call 131 551

Please send your completed application form to:

Zurich Customer Care, Locked Bag 994, North Sydney NSW 2059

7 What identification items do we need from you?

To enable Zurich to finalise payment of your redemption, we require proof of identification to be provided together with your completed Redemption form. Please note that the processing of your redemption will be delayed where you do not provide adequate identification.

You will need to post us a certified copy of ONE of the following photographic documents: (scanned copies are not acceptable)

Please tick which one applies

- An **Australian passport** (provide the pages that identify you, including the page with your photograph). A passport that has expired up to 2 years ago is also acceptable;
- An **Australian State or Territory driver's licence bearing your photograph** (front and back copies are required);
- A **proof of age card** issued by an Australian State or Territory (must contain a photograph of you);
- A **Foreign passport containing your photograph and signature** (see below for information on providing foreign language documents).

OR

If you cannot provide a certified copy of one of the above documents then you must provide **certified copies** of one document from column A and one document from column B.

A	B
<input type="checkbox"/> Australian birth certificate OR <input type="checkbox"/> Australian death certificate (for death claims only)	<input type="checkbox"/> Letter from Centrelink (or other Commonwealth, State or Territory agency) issued to you within the last 12 months regarding a government assistance payment showing your name and residential address
<input type="checkbox"/> Australian citizenship certificate	<input type="checkbox"/> Utilities bill or local government notice issued to you within the last three months showing your name and residential address
<input type="checkbox"/> Health card issued by Centrelink	<input type="checkbox"/> Notice issued by the ATO to you within the last 12 months showing your name and residential address
<input type="checkbox"/> Pension card issued by Centrelink (front and back copies)	<input type="checkbox"/> Notice from school principal showing name, residential address and period of attendance of person under 18 issued within previous three months

If you cannot provide any of these documents or you are unsure how to complete your identification form please contact us on 131 551 for assistance.

For a complete list of persons who can certify copies of documents, please contact Zurich's Customer Care team on 131 551, or refer to the Zurich website, www.zurich.com.au.

How to certify a copy of a document

The law requires that we receive certified copies of the identification documents you provide us. A certified copy is a document that has been certified as a true copy of an original document by certain persons.

An example of a certified document:

I, John Smith of 123 Park Street, Sydney NSW 2000 in the capacity of a Justice of the Peace certify that this copy is a true and accurate copy of the original.

Signature: _____

Date: _____

Please note:

- Any identification documents that are in a foreign language must be accompanied by an English translation from an accredited translator.
- If identification documents are being certified outside of the Commonwealth of Australia, generally speaking they may only be certified by an Australian consular officer (within the meaning of the Consular Fees Act 1955) or an Australian diplomatic officer. For further information on obtaining certification whilst overseas, please contact the Zurich Customer Care team on 131 551 (when calling from Australia) or 61 2 9995 1111 (when calling from overseas).

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Print Form