

23 August 2022

000034/01/010



MR GORDON CHAMBERS
PO BOX 150
WAVERLEY NSW 2024

Product name
ClearView LifeSolutions Super

Policy number
527830264

Person insured
Gordon Chambers

ClearView LifeSolutions Super



Here are some of the great benefits of your cover:

Worldwide cover

You are covered 24 hours a day anywhere in the world.

Provision for continuing cover

We cannot cancel your cover, place any further restrictions on your cover or increase your individual premium because of any change to your health, occupation or pastimes.

Provision for upgrades

Any future enhancements to this product will be made available to you. These enhancements, unless otherwise specified, will not result in any increase in premium.

Dear Mr Chambers,

We refer to your recent request to cancel the above policy.

The cancellation of this policy will generate a refund. As this is classified as superannuation money, we cannot refund the funds directly to you but will roll these funds into your nominated super fund.

To enable us to do this, please complete and return the enclosed Ongoing transfer request and authority form.

If we do not receive this information by 23 September 2022, we will then transfer the refund to the Australian Tax Office (ATO). The ATO has processes to reunite unclaimed super money into one of your active super accounts. You can find more details on the ATO website or by contacting the ATO.


Please return to us as soon as possible in the enclosed reply paid envelope.

Easy access, fast answers

If you have any questions about your cover, please contact your financial adviser, Troy Mojsoski on 1300 975 999.

Alternatively, you can contact our Life Insurance Service Centre on 132 979. We're committed to great service and that means we're always ready to help. Simply give us a call between 8am and 7pm (Sydney time), Monday to Friday, or email us at life@clearview.com.au.

Yours sincerely



John Perosh
Manager, Life Operations

Ongoing rollover transfer request and authority form

This form gives ongoing authority for ClearView to perform the following transactions on your behalf for covers held in ClearView LifeSolutions Super by you:

- Inward rollover transfer:** transfer funds with ongoing partial rollovers (tax paid) **FROM another nominated superannuation fund TO the HUB24 Super Fund** to fund the premiums for your ClearView LifeSolutions Super policy, where you have or are applying for an accumulation interest in ClearView LifeSolutions Super Rollover. If you wish to fund your super premiums with a rollover of a single lump sum amount, please contact us at 132 977.
- Outward rollover transfer:** transfer funds within super (such as claim proceeds, excess premiums and refunds) **FROM the HUB24 Super Fund TO another nominated superannuation fund.**

Please complete a separate form for each policy and return the form(s) to ClearView.

Personal details

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

Given name(s)

Surname

Residential address or mailing address

Street number and name

Suburb

State

Postcode

Contact details

Home number () Work number ()

Mobile

Email address

Tax file number (TFN)

Declining to quote your TFN is not an offence. However, if you do not provide your TFN, ClearView will not accept your application. Please refer to the ClearView LifeSolutions Super Rollover PDS for details.

TFN

HUB24 Super Fund - ClearView LifeSolutions Super

Australian Business Number (ABN)

6 0 9 1 0 1 9 0 5 2 3

Fund name

C L E A R V I E W L I F E S O L U T I O N S S U P E R
R O L L O V E R

ClearView LifeSolutions Super Rollover is a division of the HUB24 Super Fund

Policy number

Fund phone number

1 3 2 9 7 9

Unique Superannuation Identifier (USI)

N R M O O 4 3 A U

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer funds from.

Notice of complying superannuation fund

This notice confirms that the HUB24 Super Fund (Fund) (of which ClearView LifeSolutions Super is a part):

- is a resident regulated superannuation fund within the meaning of the SIS Act; and
- is not subject to a direction under section 63 of the SIS Act.

Pursuant to section 25 of the Superannuation Guarantee (Administration) Act 1992 (Cth), a contribution by an employer for the benefit of an employee to the Fund is conclusively presumed to be a contribution to a complying superannuation fund if the employer receives a copy of this Complying Superannuation Fund Notice at or before the time that the contribution is made, except in the limited circumstances set out in that section.

Nominated superannuation fund details

Australian Business Number (ABN)

1 5 6 5 5 2 8 9 7 8 4

Fund name

C H A M B E R S S U P E R F U N D

Membership or account number

C H A G O R O O O O 1 A

Fund phone number

()

Unique Superannuation Identifier (USI) - non-SMSF

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer funds from. If this fund is an SMSF, you will need to complete a rollover authority for each transaction.

For SMSFs only

Account name

CHAMBERS SUPER FUND

BSB number

182-512

Account number

969470822

Electronic service address

BGLSF360

Inward rollover transfer authorisation to the HUB24 Super Fund

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

- I apply to become a member of ClearView LifeSolutions Super Rollover and agree to be bound by the terms of the trust deed for the HUB24 Super Fund (Fund), as amended from time to time.
- I acknowledge that I have had the opportunity to read the Fund trust deed, available by calling **132 977** or online at **clearview.com.au**.
- I have received and read the PDS and Additional Information brochure for ClearView LifeSolutions Super Rollover.
- I declare that I have read and agree to the collection, use and disclosure of my personal information as set out in the 'Privacy and your personal information' section of the ClearView LifeSolutions Super Rollover Additional Information Brochure. ClearView's Privacy Policy is available at **clearview.com.au** or by contacting ClearView on **1800 265 744**. The Trustee's privacy policy is available at eqt.com.au/global/privacystatement or by contacting the Trustee's Group Privacy Officer on (03) 8623 5000.
- When I provide personal information to the Trustee about another person, I confirm that I am authorised to provide information and will inform the person (unless doing so would pose a serious threat to life or health of any individual) of the content of this form, who the Trustee is, how the Trustee will use and disclose information, that they can gain access to that information and all other matters set out in the 'Privacy and your personal information' section of the ClearView LifeSolutions Super Rollover Additional Information Brochure, and confirm that they have read the Privacy Policy.
- I am aware I may ask my superannuation provider for any information I reasonably require for the purpose of understanding my benefit entitlements, including information about any fees and charges that may apply or any other information about the effect this transfer may have on my benefits, and that I do not require any further information.
- If I am providing my TFN, I have read and understand the 'Tax File Number (TFN)' section in the ClearView LifeSolutions Super Rollover Additional Information Brochure setting out information with respect to the collection of tax file numbers.
- I am aware of any fees and charges that may apply in relation to a full or partial rollover of benefits from any other superannuation account, and I have considered where my future contributions will be paid and the effect of the rollover on any benefit entitlements (including insurance).
- If my nominated superannuation fund is a self managed superannuation fund (SMSF), I confirm that I am a trustee (or director of a corporate trustee) of the SMSF.
- I discharge the superannuation provider of my nominated superannuation fund of all further liability in respect of the benefits paid and transferred to the HUB24 Super Fund.
- I authorise my financial adviser and representatives of the Trustee of the HUB24 Super Fund to make inquiries and be provided with information about this transfer on my behalf.
- I request and consent to the transfer of superannuation from my nominated superannuation account on an annual basis for the full amount of my annual insurance premium (less any rollover tax benefit applicable) and authorise the superannuation provider of each fund to give effect to this transfer.

- This authority continues until the earliest of the following:
 - it is revoked by me in writing
 - the HUB24 Super Fund receives a replacement authority signed by me
 - my cover in ClearView LifeSolutions Super ceases, or
 - I die.

Name

GORDON CHAMBERS

Signature of account holder

Date

Outward rollover transfer authorisation from the HUB24 Super Fund

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

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for any information I reasonably require for the purpose of understanding my benefit entitlements, including information about any fees and charges that may apply or any other information about the effect this transfer may have on my benefits, and that I do not require any further information.
- If my nominated superannuation fund is a self managed superannuation fund (**SMSF**), I confirm that I am a trustee (or director of a corporate trustee of the SMSF).
- I discharge the superannuation provider of the HUB24 Super Fund of all further liability in respect of the benefits paid and transferred to my nominated superannuation fund.
- I authorise my financial adviser and representatives of the Trustee of the HUB24 Super Fund to make inquiries and be provided with information about this transfer on my behalf.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- If I am providing my TFN, I have read and understand the 'Tax File Number (**TFN**)' section in the ClearView LifeSolutions Super Rollover Additional Information Brochure setting out information with respect to the collection of tax file numbers.
- I am aware of any fees and charges that may apply in relation to a full or partial rollover of benefits from any other superannuation account, and I have considered where my future contributions will be paid and the effect of the rollover on any benefit entitlements (including insurance).
- This authority continues until the earliest of the following:
 - it is revoked by me in writing;
 - the HUB24 Super Fund receives a replacement authority signed by me;
 - my cover in ClearView LifeSolutions Super ceases; or
 - I die.

Name

GORDON CHAMBERS

Signature

Date