ADVISER TRANSFER REQUEST FORM

futura
PROTECTION

Please complete this form if you wish to transfer your existing Futura Protection plan to a new financial adviser to review and manage on your behalf as required.

Plan owner details

Plan owner	First name	Middle name	Last name
Contact number		Date of birth	☐☐ / ☐☐ / ☐☐☐☐
Email address			

Plan details

Plan number	Insured person's full name	Insured person's date of birth

New adviser details (if known)

Adviser name		Adviser code	
Contact number			
Email address			

☐ I don't have a financial adviser and would like assistance finding an adviser. I agree to be contacted by NEOS.

Privacy

Our Privacy Policy contains information about how you may access personal information held by us and how you can seek correction of such information. It also contains information about how you may complain about a breach of the Australian Privacy Principles and how we will deal with such a complaint.

You may obtain a copy of our Privacy Policy from **futuraprotect.com.au/privacy-policy**

Declaration

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

› will not have access to my plan(s)
› will not need to review my cover based on my needs; and
› will not be remunerated for my Futura Protection plan(s).

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

› have access to my plan(s),
› be provided with information in relation to my plan(s); and
› receive remuneration in relation to my plan(s).

Plan owner name

Plan owner signature   Date ☐☐ / ☐☐ / ☐☐☐☐

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