



**ZURICH**<sup>®</sup>

# Memorandum of transfer

**Use this form only to transfer/assign ownership of this policy. To avoid delays, check that all relevant information has been provided. Please use BLOCK LETTERS.**

Policy number



Policy type  Wealth Protection  Active  Sumo  FutureWise  Ezicover  Other\_\_\_\_\_

## Instructions

- use this form only when transferring/assigning ownership between individuals or companies, between Self-managed super fund (SMSF) trustees, or from a super fund trustee to an individual or SMSF trustee
- do not use this form to transfer ownership from an individual to the trustee of a SMSF or the Zurich Insurance-only Superannuation Plan, a division of the AON Master Trust
- the person/s signing as transferor must be the current owner/s of the policy and the person/s signing as transferee must be the proposed new owner/s of the policy
- transferees aged 10 - 16 must attach written parental consent
- the completed Memorandum of transfer should be provided to Zurich together with the original policy document (not required when transferring from the Zurich Insurance-only Superannuation Plan)
- a transfer/assignment of ownership is not valid until registered by Zurich Australia Limited (Zurich)
- when the transfer/assignment has been registered we will return the policy document to the transferee.

## Privacy

Information collected about you is subject to the Privacy Act and is for the purposes of administering and servicing the policy (which we may not be able to do if not provided), complying with our obligations and enhancing customer service or products.

You consent that information may be collected from and/or disclosed to your or our service providers, advisers, government bodies, (re)insurers, or related entities where relevant for these purposes or otherwise as required by law.

We may use non-sensitive information to inform you of other products and services we offer unless you tell us not to.

For more details of Zurich's Privacy Policy, information on accessing your personal information and a list of service providers, laws (e.g insurance laws) under which we collect and use personal, and countries where our data may be located, please visit our website at [www.zurich.com.au](http://www.zurich.com.au) or contact the Zurich Privacy Officer on 132 687 or at [privacy.officer@zurich.com.au](mailto:privacy.officer@zurich.com.au).

Any questions? Call 131 551

Please return the completed form to us:

By post, to **Zurich Australia Limited, Customer Care, Locked Bag 994, North Sydney NSW 2059**

**We can only accept the original of this form.**

# Memorandum of transfer

1 Transferor/s – The following section must be completed by all current policy owner/s

	Policy owner 1			Policy owner 2		
Date of transfer	Day	Month	Year	Day	Month	Year
Transferor's name in full (current policy owner)						
Signature of Transferor						
Name of Witness						
Signature of Witness (person must be over age 18 and not a party to this transfer)						

2 Transferee/s – The following section must be completed by all new policy owner/s

**Note: Generally where there is more than one policy owner, the party nominated as policy owner 1 will receive the correspondence relating to the policy.**

	Policy owner 1	Policy owner 2
Transferee's name in full (new policy owner)		
Transferee's date of birth		
Transferee's mailing address		
Transferee's occupation		
Signature of Transferee		
Name of Witness		
Signature of Witness (person must be over age 18 and not a party to this transfer)		

3 Payment details

If current payment arrangements are affected by this transfer of ownership, please submit a Direct debit request, available by contacting us on 131 551 or online at [www.zurich.com.au](http://www.zurich.com.au).

## Office Use Only

Date of Registration of Transfer by Company	Day	Month	Year	Day	Month	Year
Signature of Principal Officer of Company or Authorised Person						

**Upon registration this memorandum becomes an annexure to the Policy document for the Policy it relates to.**