

# Ordinary redemption form

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



## 1 Investment details

Zurich investment number

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Zurich investment type

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### Investor / Policyowner 1 details (or company details)

Title Surname

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Given name(s) Date of birth / /

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

Residential address State Postcode

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Postal address (if different to above) State Postcode

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Contact details Work ( ) Home ( )

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Mobile Email

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## 2 Investor / Policyowner 2 details (or company details)

Title Surname

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Given name(s) Date of birth / /

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

Residential address State Postcode

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Postal address (if different to above) State Postcode

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Contact details Work ( ) Home ( )

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Mobile Email

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## 3 Redemption / transfer amount

Total surrender/withdrawal value \$

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Partial surrender/withdrawal value \$

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## 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

Bank/State/Branch (BSB number)

Account number

Account name

Please check with your bank or financial institution that 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 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;
- declare that I/we have not assigned or mortgaged this policy nor has it has been pledged as security for any loan; and

agree that should the original policy document subsequently be found, I/we shall immediately notify Zurich, and return it for cancellation.

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 please visit our website at [www.zurich.com.au](http://www.zurich.com.au) or contact the Zurich Privacy Officer on 132 687 or email us at [privacy.officer@zurich.com.au](mailto:privacy.officer@zurich.com.au).

### Any questions? Call 131 551

Please send your completed application form to:

**Client Service Centre, Locked Bag 994, North Sydney NSW 2059**

