

Macquarie Life

Change of payment details form



Use this form to change or update the payment details on your Macquarie Life policy, change the frequency that you pay your premiums, and/or change the date on which premiums are deducted.

Please complete all sections, use black ink and mark boxes like this with an X.

For more information call **Admin/Underwriting** on 1800 005 057, fax Gateway on 1800 812 175, email us at insurance@macquarie.com, visit our website at macquarielife.com.au or mail us at GPO Box 5216 Brisbane QLD 4001. For **Claims** queries call 1800 208 130, fax 1800 065 145, email insuranceclaims@macquarie.com or mail us at GPO Box 4443 Sydney NSW 2001.

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Policy details

Please provide all policy numbers that this request applies to.

Policy number 1: Policy owner:

Policy number 2: Policy owner:

Policy number 3: Policy owner:

Policy number 4: Policy owner:

! **IMPORTANT:** Please ensure your payment method is appropriate for the policy owner/s indicated above (eg it is generally not acceptable under superannuation law to pay for your personally owned insurance via your SMSF's bank account). If unsure, please contact your Financial Adviser.

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Change of payment details

A. Would you like to alter the frequency by which future premiums are paid?

No ► **go to next question**

Yes, please indicate frequency: Monthly – an additional loading of up to 8% may apply compared to annual premium payments.
 Annually

B. Would you like to change the regular date on which premiums are deducted from your nominated account?

No ► **go to next question**

Yes, please provide preferred date of the month (eg 3rd, 15th, 21st):

If the nominated date falls on a weekend or public holiday, the premium will be deducted on the next business day.

C. Would you like to change the nominated account from which premiums are deducted for those policies listed in question 1?

No ► **go to 5**

Yes, please select one of the following: Credit card ► **go to 3**
 Direct debit from bank account ► **go to 4**

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Credit card details

Credit card type: Visa MasterCardCredit card number: Expiry date: / Name on card:

Credit card authority: I acknowledge that it is my responsibility to notify Macquarie Life of any change in credit card details, including changes to the expiry date. I authorise Macquarie Life to charge any amounts that become payable in relation to my Macquarie Life policy to my credit card, the details for which are shown above.

SignatureDate: Full given name(s): Surname:

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Direct debit request from bank account

Bank account name: Bank account BSB: - Bank account number:

Direct debit authority: I/We authorise Macquarie Life to deduct any amount that becomes payable in relation to my Macquarie Life policy from my/our account, described above. I/We have read and agree to the terms of the Direct Debit Service Agreement outlined on page 4.

Signature 1Date: Full given name(s): Surname: **Signature 2**Date: Full given name(s): Surname:

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Contact details

Your name (as per passport or birth certificate)

Title: Full given name(s):

Surname:

Sex: Male Female Date of birth: Mobile phone number:

Email address:



You only need to complete your contact details below if they have changed or not been provided previously.

Residential address (PO Box address is not acceptable)

Street name and number:

Suburb:

State: Postcode: Country:

Mailing address (PO Box address is acceptable)

Street name and number:

Suburb:

State: Postcode: Country:

Work phone number: Home phone number:

Fax number:

SignatureDate: Full given name(s): Surname:

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Direct debit request service agreement

By electing to have my premium deducted from my account by direct debit, I agree to the terms detailed below.

1. I/we have requested Macquarie Life Limited, ABN 56 003 963 773 AFSL No. 237497, (User ID 145096) to deduct my nominated account with:
 - any amounts that become payable in relation to my Macquarie Life policy, or
 - any amount needed to cover contributions to the insurance-only division of the Macquarie Superannuation Plan, through the BECS (Bulk Electronic Clearing System).
2. The financial institution may, in its absolute discretion, at any time by notice in writing to me terminate this request as to future debits.
3. Macquarie Life may, by notifying me within 14 days, vary the timing of future debits.
4. Where the due date does not fall on a business day and I am uncertain whether sufficient cleared funds will be available to meet the direct debit, I will contact my financial institution directly and ensure that sufficient cleared funds are available.
5. I can modify or defer this regular Direct Debit Request at any time by giving Macquarie Life 14 days notice.
6. I can stop or cancel the regular Direct Debit Request at any time by giving Macquarie Life or my financial institution 14 days notice.
7. If at any time I feel that a direct debit against my nominated account is inappropriate or wrong it is my responsibility to notify Macquarie Life or my financial institution as soon as possible.
8. If I believe there has been an error in debiting my account, I will notify Macquarie Life or my financial institution and confirm that notice in writing with Macquarie Life as soon as possible.
9. Direct debiting through BECS is not available on all accounts. I can check my account details against a regular statement or check with my financial institution as to whether I can request a direct debit from my account.
10. It is my responsibility to ensure that there are sufficient cleared funds in my nominated account to honour the Direct Debit Request. I understand that the Direct Debit Request will be automatically cancelled if two debit payments are dishonoured because of insufficient funds. Macquarie Life will give me 14 days notice in writing if they intend to cancel my Direct Debit Request. Macquarie Life will also charge the cost of dishonoured direct debits against my account. Macquarie Life may cancel my FutureWise cover if the Direct Debit Request is cancelled because of dishonours.
11. It is my responsibility to ensure that the authorisation given to debit the nominated account is identical to the account signing instruction held by the financial institution where the account is held.
12. Macquarie Life may need to pass on details of my direct debit request to their sponsor bank in BECS to assist with the checking of any incorrect or wrongful debits to my nominated account.

This document is current as at 15 May 2013 and is issued by Macquarie Life Limited (Macquarie Life) ABN 56 003 963 773 AFSL 237 497. Macquarie Life is not an authorised deposit-taking institution for the purposes of the Banking Act (Cth) 1959, and Macquarie Life's obligations do not represent deposits or other liabilities of Macquarie Bank Limited ABN 46 008 583 542. Macquarie Bank Limited does not guarantee or otherwise provide assurance in respect of the obligations of Macquarie Life. In deciding whether to acquire or continue to hold insurance, investors should consider the Product Disclosure Statement (PDS) available from us.

Please return all relevant forms by mail to **Macquarie Life, GPO Box 5216, Brisbane QLD 4001**, by email **insurance@macquarie.com** or by fax **1800 812 175**