

• TRANSFER OF SERVICING RIGHTS REQUEST FORM



ISSUED: FEBRUARY 2016

Date

This transfer request will only be processed on receipt of this completed form. If the request relates to a corporate superannuation plan, a letter from the Authorising Officer on the company letterhead confirming the transfer must also be included.

- I/We wish to terminate the appointment of my/our existing representative ["the Existing Representative"]; and
- I/We wish to appoint my/our new Representative ["the Appointed Representative"] as listed below:

APPOINTED REPRESENTATIVE DETAILS

Affinia Representative Name

Dealer

Policies/accounts to be transferred:

Provider name	Policy/account number	Policy/account holder name	Representative Code

CLIENT DECLARATION

By signing this "Transfer of Servicing Rights Request Form", I/we confirm that I/we have read and understood the consequences (listed below) of my/our decision to change my/our representative for the abovementioned policies/accounts:

I understand the Existing Representative:

- will no longer be remunerated for policies/accounts following this decision;
- will no longer have access to my policy/account information;
- will no longer be responsible for reviewing my ongoing needs.

I understand that the Appointed Representative and Affinia:

- will have access to the information held under these policies/accounts and therefore be responsible for looking after my changing needs;
- will be responsible for providing me with ongoing advice relating to these policies/accounts;
- will be remunerated for these policies/accounts following the transfer.

The Privacy of Affinia clients is important. Affinia is bound by obligations imposed by current privacy laws including the Australian Privacy Principles. The way in which Affinia collects, uses, secures and discloses your personal information is set out in the Affinia Privacy Policy available at [Affinia.com.au](https://www.affinia.com.au).

Client Owner 1

Signature

X

Print name

Address

Client Owner 2

Signature

X

Print name

Address

I/We accept the transfer of the policies/accounts listed above:

Affinia Authorised Representative

Signature

X

Print name

Please note that transfer of servicing rights cannot be processed unless the Appointed Representative has a Representative Code with the Fund Manager/Life Office. Please contact Affinia to arrange if one is not already in place.