

ClearView Change of Name and/or Address

Section A: Account details

Product (please tick)

- ClearView Superannuation and Roll-overs
 ClearView Pension Plan
 ClearView Rollover Bond
 ClearView Savings Bond
 ClearView Managed Investments

Account number(s)

:	:	:	:	:	:	:	:	:
:	:	:	:	:	:	:	:	:
:	:	:	:	:	:	:	:	:
:	:	:	:	:	:	:	:	:
:	:	:	:	:	:	:	:	:

Section B: Current name and address details*

Change of name requires supporting documentation to accompany this form. For example, certified copy of Marriage Certificate or certified copy of Change of Name by Deed Poll.

*Change of address can also be completed over the phone by contacting us on 132 977.

Investor 1

Mr Mrs Miss Ms Other

Surname

Given name(s)

Residential address

<input type="text"/>
Postcode

Postal address (if different from above)

<input type="text"/>
Postcode

Home phone number

Mobile phone number

Email address

Former name and address details

Mr Mrs Miss Ms Other

Surname

Given name(s)

Residential address

<input type="text"/>
Postcode

Postal address (if different from above)

<input type="text"/>
Postcode

Section C: Current name and address details*

Change of name requires supporting documentation to accompany this form. For example, certified copy of Marriage Certificate or certified copy of Change of Name by Deed Poll.

*Change of address can also be completed over the phone by contacting us on 132 977.

Investor 2

Mr Mrs Miss Ms Other

Surname

Given name(s)

Residential address

<input type="text"/>
Postcode

Postal address (if different from above)

<input type="text"/>
Postcode

Home phone number

Mobile phone number

Email address

Former name and address details

Mr Mrs Miss Ms Other

Surname

Given name(s)

Residential address

<input type="text"/>
Postcode

Postal address (if different from above)

<input type="text"/>
Postcode

Section D: Proof of Identity

Proof of Identity is only required for change of name(s) as outlined in Sections B and C.

Section E: Individuals declaration and signature

Required before any changes are processed

I/We consent to the collection, use and disclosure of my/our personal information for marketing purposes as set out in the Our Privacy Policy section.

I/We understand:

- that if I/we do not provide all required information, my/our request will not be actioned;
- my/our request will be deemed to be received and will be actioned on the day ClearView receives all required information.

If there is more than one investor, all investors must sign.

Where a company is an investor, a Company Seal must be used along with two signatures. These signatures can be from two directors or a director and a company secretary.

If signed under Power of Attorney, the Attorney verifies that no notice of revocation of that power has been received.

Company Seal
(If applicable)

Our Privacy Policy

Further information on how we handle your personal information is explained in our Information Handling Policy including:

- how to contact us regarding Privacy;
- how to inform us to change your marketing consent; and
- how to access your personal information.

You can obtain a copy of our Information Handling Policy by calling us on 1800 265 744 or by visiting our website at clearview.com.au

Signature 1

X

DATE / /

Signature 2 if applicable (Managed Investments and Savings Bond only)

X

DATE / /



This form can be posted (no stamp required) to:

ClearView
Client Administration
Reply Paid 4232
Sydney NSW 2001



If you have any questions about this form,
please call us on

132 977