

ClearView Managed Investments Death Notification

Section A: Details of deceased investor

Deceased's investment number

Name of deceased investor

Date of death

Section B: Our requirements

There are generally three types of ownership of ClearView Managed Investments: individual investors, joint tenants and tenants in common. The documentation we require depends on the type of ownership that applies to the above investment. The minimum documentation required is set out in the table below. If any of this information is not made available, processing of the claim may be delayed or denied. The original Death Notification form must be returned to ClearView.

Documentation required	Individual Investors & Tenants in Common	Joint Tenants
1. Certified copy of Death Certificate	Yes	Yes
2. Certified copy of Will	Yes	If available
3. Certified copy of probate or letters of administration	Yes	No
4. ClearView Death Notification form	Yes	Yes
5. Indemnity and Statutory Declaration	Yes*	No

* An indemnity and statutory declaration will only be needed if a certified copy of probate or letters of administration have not been provided.

Section C: Person who completed this form

By signing this form you acknowledge that, to the best of your knowledge, the information provided on this form is true and complete. You acknowledge that you have read and consent to the collection, use and disclosure of personal information as set out in the 'Privacy and your personal information' section of the Product Disclosure Statement.

Name

Address

Postcode

Phone number

Mobile number

Relationship to the deceased

Signature

Date / /

Privacy and your personal information

We need to collect, use, and disclose the personal information you have provided in this form and in any attached documents to determine to whom to pay the death benefit.

For this purpose we may also need to collect personal information from, and disclose it on a confidential basis to our related entities, government departments and agencies, investigators, lawyers, advisers, and the agent of any of these.

Not providing the personal information requested may affect our ability to do this. Where you provide personal information to us about another person, you acknowledge that you are authorised to provide that information to us, and that you will inform that person who we are, how we use and disclose their information, and that they can gain access to that

information (unless doing so would pose a serious threat to the life or health of any individual).

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 www.clearview.com.au.



If you have any questions about this form, please call us on 132 977



**This form can be posted (no stamp required) to:
ClearView Client Operations
Reply Paid 4232
Sydney NSW 2001**