

ClearView Savings Bond - Application to Switch Units

This form is to be used for the ClearView Savings Bond.

Policy owner details

Policy number

Mr Mrs Miss Ms Other

Given name(s)

Surname

Address

Work phone number

Home phone number

Mr Mrs Miss Ms Other

Given name(s)

Surname

Address

Work phone number

Home phone number

Switching details

A switching fee is currently not charged for the ClearView Savings Bond.

The investment options you can switch into are Managed and Guaranteed.

Please transfer:

\$ units or \$ from Investment Option \$ to Investment Option \$

No minimum switch amount applies

Privacy and your personal information

Collection, Use and Disclosure of your Personal Information

By providing your personal information to ClearView Life you acknowledge and declare that, and consent to:

1. we can collect and use your personal information to process your current and any subsequent transaction request, and to administer your investment;
2. for these purposes we can collect your 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;
3. where you provide personal information to us about another person, you are authorised to provide information to us, and that you will inform that person (unless doing so would pose a serious threat to the life or health of any individual) who we are, how we use and disclose their information and that they can gain access to that information.

Marketing Purposes

We are committed to providing you with access to a range of leading products and services.

In order to do this we will use your personal information to offer you other products and services. We may disclose your personal information on a confidential basis to our related entities within the ClearView Group of Companies so that they can also offer you products and services.

Signature

I have read and consent to the collection, use and disclosure of my personal information as set out in the Privacy and your personal information section.

Signature 1

X

DATE / /

Signature 2

X

DATE / /

By providing your personal information to us you acknowledge that, and consent to:

- › us collecting and using your personal information to contact you for market research and to provide you information and offers about products and services offered by us, our related entities and other organisations whose products and services we promote;
- › us disclosing your personal information on a confidential basis for these marketing purposes to our related entities and to any agent of them; and
- › you will inform us if you do not want your personal information to be used, or disclosed for these marketing purposes.

Please call 1800 265 744 if you have any questions, comments or concerns regarding privacy matters.

Our Privacy Policy

Further information on how we handle your personal information is explained in our Privacy and your personal information section including:

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

If you have any questions, comments or concerns regarding privacy matters or any other matter please call us on 1800 265 744.



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

ClearView
Client Operations
Reply Paid 4232 – GPO Box
Sydney NSW 2001



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

132 977