

# ClearView Managed Investments – Transfer of Ownership Form

Complete this form to transfer all or part of your units to another person or entity.

You may need to pay stamp duty before you return the completed form to us.

You should be aware that transferring your units may have a capital gains tax effect.

We recommend you discuss your own circumstances with your tax adviser before you decide to transfer your units.

**Affix Stamp Duty Here**  
NSW Office of State Revenue to complete.

## Section A: Transfer from

Please provide below the full details of the transferor(s) (i.e. sellers)

Your Investment number

 : : : : : : : : :

### Transferor/Seller 1

Title Mr  Mrs  Miss  Ms  Other

Surname/Company/Partnership

Given names(s)

Date of birth  /  /

### Transferor/Seller 2

Title Mr  Mrs  Miss  Ms  Other

Surname/Company/Partnership

Given names(s)

Date of birth  /  /

### Transfer details

#### Investment Option

	Number of Units	
	Words	Numbers
Aggressive	<input type="text"/>	or \$ <input type="text"/> .00
Assertive	<input type="text"/>	or \$ <input type="text"/> .00
Prudent	<input type="text"/>	or \$ <input type="text"/> .00
Cautious	<input type="text"/>	or \$ <input type="text"/> .00
Conservative	<input type="text"/>	or \$ <input type="text"/> .00
Australian Shares Growth	<input type="text"/>	or \$ <input type="text"/> .00
Diversified Growth	<input type="text"/>	or \$ <input type="text"/> .00
Diversified Balanced	<input type="text"/>	or \$ <input type="text"/> .00
Diversified Stable	<input type="text"/>	or \$ <input type="text"/> .00
Monthly Payment	<input type="text"/>	or \$ <input type="text"/> .00

## Section B: Transfer to

Do you wish to transfer the units to an existing investment in the ClearView Managed Investments?

Yes. Please provide below your investment number.

Your Investment number

 : : : : : : : : :

No. Please ensure that you also complete the Application. Form from a current Product Disclosure Statement.

Please provide below the full details of the transferee(s) (i.e. buyers)

### Transferee/Buyer 1

Title Mr  Mrs  Miss  Ms  Other

Surname/Company/Partnership

Given names(s)

Residential address

  
 Postcode

Postal address (if different from above)

  
 Postcode

Home phone no.

Work phone no.

Date of birth  /  /

### Transferee/Buyer 2

Title Mr  Mrs  Miss  Ms  Other

Surname/Company/Partnership

Given names(s)

Residential address

Postcode

Postal address (if different from above)

Postcode

Home phone no.

( )

Work phone no.

Date of birth

/ /

Section C: Declaration

I/We, the registered holder(s) and undersigned seller(s) for the above consideration do hereby transfer to the above named buyer(s) the units specified above. And I/we the buyer(s) do hereby agree to accept the said units subject to the same conditions and agree to be bound by the relevant constitution and the current Product Disclosure Statement (PDS).

Your signature(s)

If there is more than one investor, all investors must sign (unless you have previously indicated that only certain signatures were required).

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.

Signatory details of Transferor/Seller 1

Signature 1 X DATE / /

Signature 2 X DATE / /

Company Seal/Stamp (if applicable)

Signatory details of Transferor/Seller 2

Signature 1 X DATE / /

Signature 2 X DATE / /

Company Seal/Stamp (if applicable)

Signatory details of Transferee/Buyer 1

Signature 1 X DATE / /

Signature 2 X DATE / /

Company Seal/Stamp (if applicable)

Signatory details of Transferee/Buyer 2

Signature 1 X DATE / /

Signature 2 X DATE / /

Company Seal/Stamp (if applicable)

## Section D: What do you need to do?

### Step 1.

Complete and forward forms to NSW Office of State Revenue.

- i) Complete the Clearview Managed Investments - Transfer of Ownership Form with details of the transferor(s)/seller(s) and transferee(s)/buyer(s).
- ii) Lodge the Clearview Managed Investments - Transfer of Ownership Form with the NSW Office of State Revenue.

The contact details for the NSW Office of State Revenue are as follows:

**Phone enquiries: 1300 139 814**

**Mailing address: GPO Box 4042, SYDNEY NSW 2001**

Please contact the NSW Office of State Revenue to confirm payment amount and payment methods.

**Do not send money to ClearView as payment for stamp duty.**

- iii) Await NSW Office of State Revenue to complete the Clearview Transfer of Ownership Form.

This form must be stamped by, and bear the imprint of, the Stamp Duties office stamp (this includes transfers by way of a gift). This stamp shows the stamp duty paid or the exemption received from the Office of State Revenue.

### Step 2.

NSW Office of State Revenue returns the Clearview Transfer of Ownership Form.

- i) Once the Office of State Revenue completes your lodgement, mail the following to ClearView:
  - Stamped ClearView Managed Investments - Transfer of Ownership Form; and
  - Completed Application Form (located in the Product Disclosure Statement).\*

\* The Application Form only needs to be completed where the units are not being transferred to an existing investment in the ClearView Managed Investments.



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

ClearView Retirement Solutions  
Client Administration  
Reply Paid 3382  
Sydney NSW 2001

**Facsimiles of this document will not be accepted.**



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

**132 977**