

ADVISER TRANSFER REQUEST FORM



Please complete this form if you wish to transfer your existing NEOS Protection plan to a new financial adviser to review and manage on your behalf as required.

1. Plan owner details

Plan owner: First name: Middle name: Last name:

Contact number: Date of birth: / /

Email address:

2. Plan details

Plan number	Insured person's full name	Insured person's date of birth
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

3. New adviser details (if known)

Adviser name: Adviser code:

Contact number:

Email address:

I don't have a financial adviser and would like assistance finding an adviser. I agree to be contacted by NEOS.

4. Privacy

Our Privacy Policy contains information about how you may access personal information held by us and how you can seek correction of such information. It also contains information about how you may complain about a breach of the Australian Privacy Principles and how we will deal with such a complaint.

You may obtain a copy of our Privacy Policy from neosprotect.com.au/privacy-policy

5. Declaration

I have informed my existing financial adviser of my decision to change advisers and I understand that once the adviser transfer is complete, my existing adviser:

- will not have access to my plan(s)
- will not need to review my cover based on my needs; and
- will not be remunerated for my NEOS plan(s).

I understand I should seek advice in line with my changing needs and my new adviser may:

- have access to my plan(s),
- be provided with information in relation to my plan(s); and
- receive remuneration in relation to my plan(s).

Plan owner name:

Plan owner signature:

Date:

 / /

Please return your completed form to adviserservices@neoslife.com.au



neosprotect.com.au

GPO Box 239, Sydney NSW 2001

e: adviserservices@neoslife.com.au **t:** 1300 090 188

NEOS Life (NEOS) is a registered business name of Australian Life Development Pty Ltd ABN 96 617 129 914 AFSL 502759. NEOS Protection is issued by NobleOak Life Limited (NobleOak) ABN 85 087 648 708 AFSL 247302. NEOS Life provides administration services in relation to NEOS Protection on behalf of NobleOak.

FC039_1122