

# 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.

Documentation required	Joint tenants	Tenants in common and individual investors	
		Investments less than \$50,000	Investments \$50,000 or more
1. Certified copy of Death Certificate	Yes	Yes*	Yes*
2. Certified copy of Will	No	Yes*	Yes*
3. Certified copy of probate or letters of administration	If available*	If available*	Yes
4. ClearView Death Notification form	Yes	Yes	Yes
5. Indemnity and Statutory Declaration	No	Yes**	Yes**

\* If a certified copy of probate or letters of administration is received, a certified copy of the Death Certificate and certified copy of the Will are **NOT** required to be submitted.

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

Name

Relationship to the deceased

Address

Postcode

Phone number

Signature 1

X

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 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.



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



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

**ClearView Retirement Solutions**  
Client Operations  
Reply Paid 3382 – GPO Box  
Sydney NSW 2001