

ClearView Request for Individual Consolidated Statement

Please complete this form if you are a ClearView investor who has a ClearView financial plan in conjunction with your partner and would like to receive an Individual Consolidated Statement instead of a Joint Consolidated Statement.

1. Consolidated Statement Information

ClearView Retirement Solutions provides account information to our investors on their ClearView branded investments in the form of a "Consolidated Statement" for each half year ended 30 June and 31 December.

As a joint-plan investor you and your partner would normally receive a "Joint" Consolidated Statement which is one statement listing all of the ClearView investments you and your partner hold individually and jointly.

2a. Investor Details

Mr Mrs Miss Ms Other

Surname

Given name(s)

Home Address

Postcode

Home phone number

Work phone number

Date of birth

OFFICE USE ONLY - Identity number

2b. Partner's Details

Mr Mrs Miss Ms Other

Surname

Given name(s)

OFFICE USE ONLY - Identity number

3. Investor Request & Signature

I do not wish for any of my ClearView branded investments held solely in my name to be listed on a Joint Consolidated Statement with my partner. I request that these investments not be listed on any statement sent to any other person, and request that they should be listed only on the Consolidated Statement addressed and sent to me. I request that this take place from the next financial half year end statement effective after the date on which ClearView receives this completed request form.

Investor's Signature

X

DATE / /

OFFICE USE ONLY - Date received



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

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



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

132 977