



Authority to release information

Policy number

Policy number

Policy number

Policy number

We respect your privacy and handle your information in accordance with our privacy policy, available on mlcinsurance.com.au/privacy-policy

Section 1: Policy Owner(s)/Member details

I/We

Policy Owner 1/Member 1

Policy Owner 2/Member 2

authorise the representative below to obtain information (other than sensitive/health information) on my/our behalf of the above policy number(s).

Date of birth (DD/MM/YYYY)

Date of birth of Policy Owner 2 (if applicable)

Duration of authority (eg 6 months or indefinitely)

Contact telephone (business hours)

Please note that if a specified term is not nominated this authority will be valid indefinitely.

Postal address

Your postal address cannot be your financial adviser's address.

Unit number

Street number

PO Box

Street name

Suburb

State

Postcode

Country

The Trustee

NULIS Nominees (Australia) Limited
ABN 80 008 515 633 AFSL 236465

The Fund

MLC Super Fund
ABN 70 732 426 024

The Insurer

Insurance is issued by MLC Limited
ABN 90 000 000 402 AFSL 230694

The Trustee of the Fund is part of the National Australia Bank Limited (NAB) Group of Companies (NAB Group). Your insurance is not a liability of, and is not guaranteed by, NAB. MLC Limited uses the MLC brand under licence. MLC Limited is part of the Nippon Life Insurance Group and is not a part of the NAB Group of Companies. Any references to 'we', 'us' and 'our' in this form means MLC Limited and Trustee refers to NULIS Nominees (Australia) Limited.



Section 1: Policy Owner(s)/Member details continued

Signature of Policy Owner 1/Member or Power of Attorney 1

X	Date (DD/MM/YY)
	<input type="text"/>

If signed under the Power of Attorney: Attorneys must attach a certified copy of the Power of Attorney if not already supplied. The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be faxed or emailed.

Signature of Policy Owner 2/Member or Power of Attorney 2 (if applicable)

X	Date (DD/MM/YY)
	<input type="text"/>

Section 2: Authorised representative to complete

This information will be used for our security checking procedures.

Mr Mrs Miss Ms Other First name

Middle name Last name

Date of birth (DD/MM/YYYY)

Or Company Representative:

Company name

ABN

AFSL

Contact details

Home telephone

Business telephone

Mobile

Fax

Email

Postal address

Unit number

Street number

PO Box

Street name

Suburb

State

Postcode

Country

Section 3: Send us your form

Please return your completed, signed and dated form to:

MLC Life Insurance - Operations
PO Box 23455
Docklands VIC 3008

Email: enquiries.retail@mlcinsurance.com.au

If you have any questions, please contact your financial adviser or call us on **136 525**, 8.30am to 6pm AEST, Monday to Friday.



Proof of Identity Guide

We are required to collect (and verify) customer identification from you, anyone acting on your behalf and your related parties before processing any transaction on your account. All documents we request need to be dated, must be an original or certified copy of original document(s) and must be valid at the time you send them to us. If we aren't able to verify your identity, we may from time to time request additional identification information from you. See below for further details.

PART 1 - ACCEPTABLE PRIMARY PHOTOGRAPHIC ID DOCUMENTS

If you do not own a document from this section, then provide documents from Part 2 or 3.

Select **ONE** document from this section (please tick).

- A valid Australian State/Territory driver's licence containing a photograph of the person.
- Australian passport (a passport that has expired within the preceding 2 years is acceptable).
- A valid Australian State/Territory issued Proof of Age Card containing a photograph of the person.
- Foreign passport or similar travel document containing a photograph and the signature of the person.

PART 2 - ACCEPTABLE SECONDARY ID DOCUMENTS

Should only be completed if the individual does not own a document from Part 1

Select **ONE** document from this section (please tick) **AND**

- Australian birth certificate
- Australian citizenship certificate
- Australian pension card issued by the Department of Human Services
- Australian Health Care card issued by the Department of Human Services

Select **ONE** document from this section (please tick).

- A document issued by the Australian Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to the individual and which contains the individuals name and residential address (Centrelink Benefits notice).
- A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by the individual to the Commonwealth (or by the Commonwealth to the individual), which contains the individuals name and residential address (ATO notice of assessment).
- A document issued by an Australian local government body or utilities provider within the preceding 3 months which records the provision of services to that address or to that person (the document must contain the individuals name and residential address) (Utilities or Council Rates notice).
- If under the age of 18, a notice that was issued to the individual by a school principal within the preceding 3 months and contains the name and residential address and records the period of time that the individual attended that school.

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PART 3 - ACCEPTABLE FOREIGN PHOTOGRAPHIC ID DOCUMENTS

Should only be completed if the individual does not own a document from Part 1 and 2.

Select **BOTH** documents from this section (please tick).

- Foreign driver's licence that contains a photograph of the person in whose name the card was issued and the individual's date of birth*
- National ID card issued by a foreign government containing a photograph and a signature of the person in whose name the card was issued*

* If the identification document is written in a language other than English, you must provide a translation into English by a translator who is accredited by the National Accreditation Authority for Translators and Interpreters

The Anti-Money Laundering and Counter-Terrorism Financing Rules 2007 (No. 1) list the following parties as being authorised to certify your ID documents:

A document is only accepted as a certified copy if it has been certified as a true copy of the original document by a person who is currently licensed or registered to practise in Australia, in an occupation below:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner
- A Justice of the Peace
- A Judge of a court
- A Magistrate
- A chief executive officer of a Commonwealth court
- A notary public (for the purposes of *the Statutory Declaration Regulations 2018*)
- A Police Officer
- An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- A permanent employee of the Australian postal corporation with 5 or more years of continuous service who is employed in an office supplying postal services to the public
- An Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*)
- An officer with 5 or more years of continuous service with one or more financial institutions (for the purposes of *the Statutory Declaration Regulations 2018*) (eg bank manager, bank officer)
- A finance company officer with 5 or more continuous years of service with one or more finance companies (for the purposes of *the Statutory Declaration Regulations 2018*)
- An officer or an authorised representative of, a holder of an AFSL, having 5 or more continuous years of service with one or more licensees (eg financial planner, advisor, broker)
- A member of the Institute of Chartered Accountants in Australia, CPA Australia, the Australian Association of Taxation and Management Accountants and the Institute of Public Accountants
- Pharmacist

Authorised parties that are able to certify foreign identification documents:

Authorised Persons where the Authorised Person is an officer who holds the following positions overseas:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- Employee of the Australian Trade and Investment Commission who is:
 - In a country or place outside of Australia; and
 - Authorised under paragraph 3(d) of the *Consular Fees Act 1955*; and
 - Exercising his or her function at that place
- Employee of the Commonwealth including Australian Consular Officers who are:
 - In a country or place outside of Australia; and
 - Authorised under paragraph 3(d) of the *Consular Fees Act 1955*; and
 - Exercising his or her function at that place
- Judge of a Court or Magistrate
- A person authorised as a Notary Public in a foreign jurisdiction
- A person who is authorised by law in the relevant jurisdiction to administer oaths or affirmations or to authenticate documents

Acceptable authorised translation services for foreign identification documents:

- An approved translator listed in the National Accreditation Authority for Translators and Interpreters (NAATI)

Acceptable certification of ID documents

Each copy of the ID must be certified by the authorised party as follows. The authorised party must write the following on each photocopy:

- Full name of the certifier
- Date of certification (date must be within the last 6 months)
- Occupation of certifier (capacity in which they are signing - occupation must be in list of authorised certifiers above)
- Signature of certifier
- Statement to the effect that the document is a true copy of the original

Have you changed your name?

If your name has changed (e.g. due to marriage, divorce or registered name change), please also provide an original, certified copy of the official linking document that verifies your change of name (e.g. marriage certificate, deed poll, divorce orders or change of name certificate from the Births, Deaths and Marriages Registration Office).

Does your name or date of birth differ from the details shown on our records?

If your name or date of birth differs from personal details shown on our records (i.e. spelling error, initials or common name translation) please also provide a certified copy of official documentation that verifies your accurate name or date of birth.

Has your residential address changed?

If your residential address has changed please also provide a certified copy of your telephone or utilities bill (within the preceding 3 months) in your name reflecting the new address, or a certified copy of the front and back of your Australian driver's licence which shows your new address.

Are you signing a transfer or cash withdrawal request on behalf of another person?

If you are signing a transfer or cash withdrawal request on behalf of another person please provide all the documents listed below;

- proof of identification for the member you are signing on behalf of as outlined in acceptable documents;
- an original certified copy of Guardianship papers or Power of Attorney;
- Complete the Identification for Individual forms and provide proof of identification of yourself as outlined in acceptable documents.