



Funeral Director Memorandum of Transfer

Important: Please Read

A Memorandum of Transfer is for use only when the ownership of the policy is to change.

You may need to provide proof of identification

As the policy has an investment or surrender value, transferees (new owners) will need to complete a relevant Identification Form available at KeyInvest.com.au.

The ID form needs to be attached to this form and returned to us together with certified copies of your required identification documents. The transfer won't be able to proceed until we receive this information.

Please Note:

- a) The person signing as Transferor must be the current owner of the policy and the person signing as Transferee should be the new owner of the policy.
- b) The Life Insurance Act provides that an assignment (transfer of ownership) is not valid until registered by us.
- c) Please ensure you include the address to which future correspondence is to be sent.
- d) Any transfer maybe liable for Stamp Duty.
- e) Under the Constitution of Company (KeyInvest), upon registration of the assignment:
 - 1) the Transferee is not admitted as a Member of the Company; and
 - 2) the Transferor remains a Member of the Company.

KeyPlanner

Nomination or Change of Assignee Form

1. Transferor details – current Policy Owner

All current policy owners are required to complete this section and sign. All signatures must be witnessed by a person aged over 18 or above, not associated with the policy.

Trading As:

Transferor (if a person)

OR

Transferor (if a Company)

Title

Mr

Mrs

Ms

Miss

The Common Seal of

First Name

Middle/
Name(s)

ACN

Surname

is affixed in accordance with section 127 of the Corporations Act 2001 (Cth) and in the presence of:

Signature of Transferor (current Owner)

Signature of Director (current Owner)

Full Name

Signature of Witness

Signature of Directory/Secretary

Full Name

Full Name

Date

Date

KeyPlanner

Nomination or Change of Assignee Form

2. Transferee details – new Policy Owner

The new policy owner can be a person aged 18 or above. It may not be an unincorporated trust (most Family Trusts are not incorporated), however, ownership can be transferred to individual trustees. All new owners must complete and sign this form. All signatures must be witnessed by a person aged 18 or above not associated with the policy

Trading As:

Transferee (if a person)

OR

Transferee (if a Company)

Title

Mr

Mrs

Ms

Miss

The Common Seal of

First Name

Middle/
Name(s)

ACN

Surname

is affixed in accordance with section 127 of the Corporations Act 2001 (Cth) and in the presence of:

Signature of Transferee (current Owner)

Signature of Director (current Owner)

Full Name

Signature of Witness

Signature of Director/Secretary

Full Name

Full Name

Date

Date

KeyPlanner

Nomination or Change of Assignee Form

3. Contact details

Business Address (must not be a PO Box)

Unit Number	Street №	
Street Name		Suburb
State	Postcode	Country
Phone		Email

Postal Address

Unit Number	Street №	PO Box
Street Name		Suburb
State	Postcode	Country

*When completed, forward this Memorandum of Transfer to:
KeyInvest Ltd, PO Box 3340 Rundle Mall SA 5000*

Office Use Only

Date of Registration of Transfer by Company

**Signature of Principal Officer of Company
or Authorised Person**

Full Name