



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.

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: the Transferee is not admitted as a Member of the Company
- f) By signing this form, the Transferor acknowledges that the full value of the named Funeral Policy at the time of the transfer, as well as any future earnings, will be transferred to the ownership of the Transferee.
- g) By signing this form, the Transferee acknowledges that they take ownership of the Funeral Policy including its value at the time of the transfer, until such time as the Transferee makes a valid claim upon the death of the member.

Change of Assignee Form

All current and new policy owners are required to complete this page and sign.

Policy Number

Member Name

1. Transferor details — current Policy Owner/Funeral Director

Trading As:

Authorised Signatory 1 (current Funeral Director)

Authorised Signatory 2 (where applicable)

Date

Date

2. Transferee details — new Policy Owner/Funeral Director

Trading As:

Authorised Signatory 1 (new Funeral Director)

Authorised Signatory 2 (where applicable)

Date

Date

Note: If the Funeral Director named at 2 is not currently registered with KeyInvest, a Funeral Director Registration Form will be required to be completed prior to the Transfer occurring.

3. Contact details — new Policy Owner/Funeral Director

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

Change of Assignee Form

4. Member acknowledgement

I confirm the transfer of the policy assignment above. By signing I acknowledge that ownership of the Policy is transferred from the originating Funeral Director (Transferor) named at 1, to the new Funeral Director (Transferee) named at 2.

Member Signature 1

Member Signature 2

Name

Name

Date

Date

If a joint policy, both Members must sign.

NB: If signed as Power of Attorney for the named Member, please provide certified copies of the Power of Attorney and certified copies of the Attorney ID to KeyInvest.

You can submit this form in person, by mail or by email:

Street Address:

KeyInvest
Level 5, 49 Gawler Place
ADELAIDE SA 5000

Postal Address:

KeyInvest
PO Box 3340
RUNDLE MALL SA 5000

Phone 1300 658 904
Email info@keyinvest.com.au
Web www.keyinvest.com.au
Hours 8.30am – 5.00pm (CST)

Office Use Only

Date Received

Supporting Documents
Received

Date of Registration

Correspondence Sent

Signed by
Authorised Officer

Name of
Authorised Officer