

Any questions?
Please call us

 **1300 880 750**

Memorandum of transfer

Part A - Policy details

Please transfer Policy Number to the transferee named in Part C below.

Part B - Transferor details (current Policy Owner)

Date of Transfer

Transferor's Name

Transferor's Signature

Date

Transferor's Signature (if more than one Policy Owner)

Sign here

Date

Witness's Signature

Date

Is this a transfer to a financial institution as security for a debt? Yes ☐ No ☐

If you are transferring to a new policy owner please complete Part C. Policy ownership can not be transferred to a superannuation fund. Part E is to be completed in both cases.

Part C - Transfer to a new Policy Owner

Name of new Policy Owner

Full Name

Or Name of Financial Institution

Name

Postal Address of new Policy Owner

Residential Address

Contact Number

Email Address

Transferee's Signature

Date

Witness's Signature

Date

Note: If the Transferee is a Financial Institution which is taking the transfer of this policy as security for a debt, Insuranceline will continue to send premium notices to the Transferor.

Please keep a copy of this form for your records.

Products are issued by TAL Life Limited ABN 70 050 109 450 AFSL 237848 and, for Involuntary Unemployment Cover, St Andrew's Insurance (Australia) Pty Ltd ABN 89 075 044 656 AFSL 239649 (the insurers). TAL Direct Pty Limited ABN 39 084 666 017 AFSL 243260 (TAL Direct) has been authorised under an arrangement with the insurers to enter into, vary or cancel insurance cover on behalf of the insurers as if it were the insurers. Insuranceline is a trading name of TAL Direct.

Part D - Registration of transferDate of Registration of Transfer by TAL

Signature of Principal Officer of Company or Authorised Person

Sign here

Date

Part E - Banking details**Payment Frequency**

Fortnightly on

Mon

☐

Tues

☐

Wed

☐

Thurs

☐

Fri

☐

Starting from

Monthly on the

of each month (enter a date between 1st and 28th of the month)

Payment Method

Card Type

Debit

☐

Credit Card

☐**Credit Card Payments**

I authorise the debit of my premium from my

Visa

☐

Mastercard

☐

Expiry Date

Account Name

Card Number

Direct Debit Request

I request and authorise TAL Life Limited (User Number: 245 397) to arrange, through its own financial institution, a debit to the account nominated below of any amount TAL Life Limited has deemed payable by me.

BSB Number (Branch Number)

Name and Address of Bank/Financial Institution

Account Name

Account Number

Declaration

I/We request and authorise TAL Life Limited (User Number: 245397) to arrange for the premiums for this Policy to be debited from the credit card or account nominated in this form, through the Bulk Electronic Clearing System (BECS). I/We acknowledge that this direct debit request is governed by the Insuranceline direct debit request service agreement (DDRSA) and that I/we have read and agree to the terms of the DDRSA. I/We acknowledge that these debits will appear as 'Insuranceline' on credit card or bank statements.

For joint accounts, if required, both account holders must sign below.

Sign here

Date

Sign here

Date

Part F - Your privacy

The privacy of Insuranceline customers is important and Insuranceline is bound by obligations imposed by current privacy laws including the Australian Privacy Principles.

The ways in which Insuranceline and St Andrew's collect, use, secure and disclose your personal information, as well as details about how to access or correct your personal information held by us, or make a complaint in relation to privacy, are set out in the Insuranceline and St Andrew's Privacy Policies, which are available at www.insuranceline.com.au/Privacy-Policy and www.standrews.com.au or free of charge on request to Insuranceline by contacting **1300 880 750** or customerservice@insuranceline.com.au

Access to information held about you

Under the current privacy legislation, you are generally entitled to access the personal information we hold about you. To access that information, simply make a request in writing. This process enables us to confirm your identity for security reasons and to protect your personal information from being sought by a person other than yourself. If, for any reason we decline your request to access and/or update your information, we will provide you with details of the reasons. In some circumstances it may be appropriate to provide copies of complex medical information to a treating GP rather than directly to our customer so that the medical terminology can be explained. There are some limited exemptions where TAL would be unable to provide the personal information that we hold about you and these include the following circumstances:

- if the access would have an unreasonable impact on the privacy of other people;
- if the access request is frivolous or vexatious; or
- if giving access would be unlawful.

Disclosure of information

In processing and administering your insurance (including at the time of claim) we may disclose your personal information to other parties such as organisations to whom we outsource our mailing and information technology, Government regulatory bodies, other companies within the TAL group, and accountants (if applicable). We may also disclose your personal information (including health information) to other bodies such as the reinsurers, health professionals, investigators, lawyers and external complaints resolution bodies. Generally we do not use or disclose any customer information for a purpose other than providing our products and services unless:

- our customer consents to the use or disclosure of the customer information; or
- the use or disclosure is required or authorised under an Australian law or a court/tribunal order; or
- the use or disclosure of the information is reasonably necessary for one or more enforcement related activities conducted by, or on behalf of, an enforcement body e.g. the police.

Direct marketing opt out

From time to time Insuranceline may use your information to offer, invite you to apply or promote and market (including via telephone where we have your valid consent) our products and services to you. Your consent shall remain in effect in accordance with relevant law or until you tell us otherwise. For more information about our marketing practices please refer to the 'Your Privacy' section of the PDS/FSG and our privacy policies. If you do not want to receive telemarketing calls, or would prefer to receive telemarketing calls at certain times or days, please call us on **1300 880 750**. If you do not want to receive any information on other products or services offered by Insuranceline or the insurer, please contact us.



How to return your documents

Please return this form to Reply Paid 5380, Sydney NSW 2001