

Memorandum of Transfer

A memorandum of transfer is for use only when the ownership of the policy is to change. It is not applicable if a superannuation fund is a current or proposed policy owner.

1. The person/s signing as transferor must be the current owner/s of the policy.
2. The person/s signing as the transferee should be the new owner/s of the policy.
3. If the policy is owned or to be transferred to a company, please ensure at least 2 directors or a director and company secretary sign as the current or new policy owner.
4. If the company has a sole director/company secretary, please ensure that a letter on company letter head and stamped with the company stamp accompanies this form.
5. The Life Insurance Act 1995 provides that a transfer is not valid until it is registered by us.
6. A transfer may be liable to stamp duty.

Privacy - Use and disclosure of personal information

Your privacy with MetLife Insurance Limited ABN 75 004 274 882 AFSL 238096 ('MetLife' or the 'Insurer')

The personal information you provide in the form is necessary for MetLife to provide you with the products and services you have requested from MetLife, and to manage your claim. You do not have to provide MetLife with your personal information, but if you do not do so MetLife may not be able to provide you with the products or services. MetLife complies with the Privacy Act 1988 and the principles laid out in its Privacy Policy which details information about the entities that MetLife usually discloses personal information to (including overseas recipients), how you may access or seek correction of your personal information, how we manage that information and our complaints process. MetLife's Privacy Policy is readily available and can be viewed at www.metlife.com.au/privacy.

Section A. Transferor details (current owner)

Policy number

Policy owner 1

Full name of transferor (transfer from)

Signature of transferor

▶ _____
Date (dd/mm/yyyy)

Full name of witness

Signature of witness

▶ _____
Date (dd/mm/yyyy)

Policy owner 2

Full name of transferor (transfer from)

Signature of transferor

▶ _____
Date (dd/mm/yyyy)

Full name of witness

Signature of witness

▶ _____
Date (dd/mm/yyyy)

Section B. Transferee details (new owner)

Policy owner 1

Full name of transferee (transfer to)

| | | | |
|---------|--------|-------|----------|
| Address | Suburb | State | Postcode |
|---------|--------|-------|----------|

| | |
|-------------------------|-------------------|
| Signature of transferee | Date (dd/mm/yyyy) |
|-------------------------|-------------------|

Full name of witness

| | |
|----------------------|-------------------|
| Signature of witness | Date (dd/mm/yyyy) |
|----------------------|-------------------|

Policy owner 2

Full name of transferee (transfer to)

| | | | |
|---------|--------|-------|----------|
| Address | Suburb | State | Postcode |
|---------|--------|-------|----------|

| | |
|-------------------------|-------------------|
| Signature of transferee | Date (dd/mm/yyyy) |
|-------------------------|-------------------|

Full name of witness

| | |
|----------------------|-------------------|
| Signature of witness | Date (dd/mm/yyyy) |
|----------------------|-------------------|

Section C. Transfer details (to be completed by MetLife)

| | |
|--|---------------------------------|
| Date transfer is registered by MetLife Insurance Limited | Signature of authorised officer |
|--|---------------------------------|

Please return completed form to

MetLife Insurance Limited, GPO Box 3319, Sydney NSW 2001 or email auservices@metlife.com
For more information or assistance with the completion of this form, call us on 1300 555 625
Monday to Friday 8am - 6pm AEST.

metlife.com.au

Products are offered by MetLife Insurance Limited (MetLife) which is an affiliate of MetLife, Inc. and operates under the "MetLife" brand. None of the obligations of MetLife are guaranteed by MetLife, Inc. (Incorporated in the USA) or any other member of the MetLife group.



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ABN 75 004 274 882 AFSL NO. 238 096

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