

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 letterhead 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 current policy owner

Signature of current policy owner



Date (dd/mm/yyyy)

Full name of witness

Signature of witness



Date (dd/mm/yyyy)

Policy owner 2

Full name of current policy owner

Signature of current policy owner



Date (dd/mm/yyyy)

Full name of witness

Signature of witness



Date (dd/mm/yyyy)

Section B. Transferee details (new owner)

If you would like to change how you pay your premiums, please complete and attach with this form, the Direct Debit Request form or the Enduring Rollover Authority form (if applicable) otherwise any ongoing premiums will continue to be deducted from the existing payment details.

If you would like to transfer your policy to three or more new policy owners, please contact us on 1800 523 523 for more information.

Policy owner 1

Full name of new policy owner

Date of birth (dd/mm/yyyy)
(not applicable if the new owner is a company)

Address

Suburb

State

Postcode

Occupation of new policy owner (not applicable if the new owner is a company)

Email

Phone

Preferred contact method (please select one)

☐ Email ☐ Post

Signature of new policy owner



Date (dd/mm/yyyy)

Full name of witness

Signature of witness



Date (dd/mm/yyyy)

Policy owner 2

Full name of new policy owner

Date of birth (dd/mm/yyyy)
(not applicable if the new owner is a company)

Address

Suburb

State

Postcode

Occupation of new policy owner (not applicable if the new owner is a company)

Email

Phone

Preferred contact method (please select one)

☐ Email ☐ Post

Signature of new policy owner



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	Date of transfer

Please return the completed form to
MetLife Insurance Limited, GPO Box 3319, Sydney NSW 2001
or email auprotect@metlife.com

For assistance with the completion of this form, please call us on
1800 523 523 Monday to Friday 9am - 5pm AEDT.

[metlife.com.au](https://www.metlife.com.au)

MetLife Protect Super is issued by Stewarda Pty Ltd (ABN 56 098 527 256, AFSL 236049, RSE Licence L0000185) (the 'Trustee') as trustee for the MetLife Australia Superannuation Fund (USI 68964712340007), which is a division of the Smart Future Trust (ABN 68 964 712 340). Fund Administration services are provided by Insurance & Superannuation Administrative Services Pty Ltd ABN 31 058 682 876 | PO Box 1305 South Melbourne VIC 3205 | Customer Service (03) 9621 7225 | Fax (03) 9621 7100 | Email metlifesuperfund@iasas.com.au. Insurance cover is provided to Stewarda Pty Ltd under a Policy issued by MetLife Insurance Limited ABN 75 004 274 882 | AFSL 238096 | GPO Box 3319 Sydney NSW 2001

