

# Withdrawal form

## Information sheet

### When to use this form?

Use this form to request a full or partial withdrawal from your non-superannuation product.

### How to complete this form

#### Before completing the form

- When completing this form, please print in CAPITAL LETTERS and place a cross in any applicable boxes
- This form must be completed by all policy owners.

#### Section 2 – Primary and secondary owner

- All owner's personal details must match the identification documents you are providing
- If there are joint owners, section 2b must be completed, and the secondary owner must sign at Section 5
- By providing your email address, you consent to receiving all future communications, including information about products and services offered by Resolution Life, to the email address you provide.

#### Section 3 – Withdrawal options

- A full withdrawal is available to all products.
- Partial withdrawal and bonus cashing are only eligible on certain products, please refer to your policy documents for eligibility and any minimum amounts.
- Withdrawal on maturity is only available for Whole of Life, Endowment, Pure Endowment and PruPac policies. The collection of the bonuses on your policy will result in the death benefit on your policy decreasing by a greater amount than what you have withdrawn.
- For partial withdrawals, if you have a unit-linked product, you are required to indicate which investment options you wish to withdraw from. If you do not provide this information, we will process the withdrawal proportionately across all your investment options.

#### Section 4 – Payment details

- Please complete all details of your Australian bank, building society or credit union account. Direct credit is not available to credit card accounts.
- The account must be made in the name of at least one policy owner. We cannot make payments to third parties.

#### Section 5 – Authorisation and signature(s)

- Please ensure you have read the authorisation fully before signing
- If there are joint owners, the second owner's signature must be completed
- In the date field below the signature, please use the date you sign the form.

#### After completing the form

- Please review the checklist on the final page before returning your form to us
- If you're signing this form digitally, please make sure you attach a certificate of completion, otherwise, please print this form and sign it using a pen.

# Identification requirements

## Why we need to verify your identity

We are required to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. This means we may need to obtain additional identification details when you commence a new account or undertake transactions in relation to your account.

Your identification may need to be verified before we can approve your withdrawal request. We may decide to delay or refuse any request or transaction, including suspending a withdrawal application if we are concerned that there may be a breach of our legal obligations.

## Verifying your identity

### You have two options to verify your identity

1. To save time and effort you can complete your ID verification online with GreenID. GreenID is an online platform which we can use to verify your identity. With GreenID, you can verify your identity against reliable and trustworthy government data sources in real-time.  
You can access GreenID at the following web address: [verify.gbgid.me/ceb01804c2e18a39d69bad9e7a01f7ce/](https://verify.gbgid.me/ceb01804c2e18a39d69bad9e7a01f7ce/) hosted-landing-page
2. Alternatively, you can post or email us a certified copy of one of the following identification documents:

## Documents you can send us

- Current Australian state or territory driver licence
- Current Australian passport
- Current Australian state or territory identity card
- Current foreign passport
- Current foreign driver licence that has your photo
- Current national identity card that has your photo

If you are unable to provide any of the above, you can see the full list of valid identification documents at [resolutionlife.com.au/identification](https://resolutionlife.com.au/identification).

! Please send us original **certified copies** of your original documents – don't send us the original documents. If the document is not written in English, then you must also attach an English translation prepared by an accredited translator.

## Getting your copies certified

A copy of a document must be certified to be a true and correct copy of the original document. Only certain people can certify copies including:

- Police officer or sheriff
- Justice of the peace or notary public
- Legal practitioner, magistrate, judge or registrar/deputy registrar of a court
- Medical practitioner, nurse, pharmacist, physiotherapist, optometrist, dentist or veterinary surgeon

## Example

I certify that this is a true and correct copy of the original document:

*John Citizen*

John Citizen, Justice of the Peace  
10 Other Street, Suburb NSW 2000  
02 9999 9999 30 June 2025

You can find the full list of people who can certify documents or extracts at [resolutionlife.com.au/identification](https://resolutionlife.com.au/identification).

## Have you changed your name or are you signing on behalf of another person?

If you've changed your name or are signing on behalf of the applicant, you'll need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names. The following table contains example information about suitable linking documents:

Purpose	Suitable linking document
Change of name	<ul style="list-style-type: none"><li>– Marriage certificate</li><li>– Deed poll</li><li>– Change of name certificate from Births, Deaths and Marriages Registration Office.</li></ul>
Signing on behalf of applicant	<ul style="list-style-type: none"><li>– Guardianship papers</li><li>– Power of Attorney</li></ul>

## What you need to know

This product is issued by Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life).

Where the information in this document is factual information only, it does not contain any financial product advice or make any recommendations about a financial product or service being right for you. Any advice is provided by Resolution Life, is general advice and does not take into account your objectives, financial situation or needs. Before acting on this advice, you should consider the appropriateness of the advice having regard to your objectives, financial situation and needs, as well as the product disclosure statement (if available) and policy document for this product. Any guarantee offered in this product is only provided by Resolution Life. Any Target Market Determinations for this product can be found at [resolutionlife.com.au/target-market-determinations](https://resolutionlife.com.au/target-market-determinations).

Resolution Life can be contacted at [resolutionlife.com.au/contact-us](https://resolutionlife.com.au/contact-us) or by calling 133 731.

# Withdrawal form – non-superannuation

## 1. Account details

Plan number

## 2a. Primary owner details

Title Date of birth

 

Surname

Given name(s)

Residential address (a PO Box is not acceptable)

  

Suburb State Postcode

  

Contact phone number Mobile number

 

Email address

Occupation (if retired, please specify)

Country of residence

Country of citizenship

## 2a. Primary owner details (continued)

### Address for communication

☐ Please cross ☒ if the same as residential address

Address

  

Suburb State Postcode

  

## 2b. Joint owner details (if applicable)

Title Date of birth

 

Surname

Given name(s)

Residential address (a PO Box is not acceptable)

  

Suburb State Postcode

  

## 3. Payment options

What type of payment do you require?

☐ Full withdrawal☐ Bonus cashing \$ ☐ Full withdrawal upon maturity – please process my benefit payment once my policy matures on ☐ Partial withdrawal \$ ☐ Deduct the amount to be withdrawn proportionately across all of my investment options.☐ Deduct the amount to be withdrawn from the investment options listed in the table below:

Investment option name

Amount (\$)


#### 4. Payment method

How do you want your payment to be made?

- ☐ **Payment to bank account**  
(payable only to plan owner/owners)

Name of account holder

BSB

Account number

- ☐ **Transfer to a Resolution Life plan**

Plan number or Member number

#### 5. Authorisation and signature

**As the owner(s) I/we declare that:**

- I/We acknowledge that Resolution Life will determine the amount payable when Resolution Life receives all its requirements.
- I/We acknowledge that if the policy is unit-linked, the amount payable on withdrawal is the number of units in each investment option, multiplied by the relevant unit or release price(s), less any exit fee or cash value factor (if applicable). The unit or release price(s) will be those determined by Resolution Life.
- I/We acknowledge that this withdrawal will reduce the amount(s) of any cover provided by those benefits applying to the principal life insured (ie Death Benefit, Disablement Lump Sum Benefit and Crisis Benefit, where applicable).
- I/We declare that there is no other party holding an interest in this plan.
- I/We declare that all details on this form are true and correct.
- I/We authorise Resolution Life to verify my/our identity via GreenID if necessary
- I/We have enclosed:
  - the **policy document** or **lost policy declaration** form
  - any **memorandums of alteration** or **additional insurance**
  - a certified copy of some form of identification with my signature.

**If you are signing as a trustee:**

- You warrant that, at the time of signing, you are authorised under the relevant trust deed to apply and to do all things necessary as a result of becoming an investment owner.

#### 5. Authorisation and signature (continued)

**If you are signing under a power of attorney:**

- You verify that, at the time of signing, you had not received notice of revocation of that power of attorney. In the event that a certified copy of the power of attorney has not been previously provided, you must submit this with the completed form.

**If you are under age 16:**

- I/We as the owners have completed the Under age 16 parental and guardian form

Signature of primary owner

Date signed

Signature of joint owner (if applicable)

Date signed

#### Checklist

Please ensure you complete this checklist before sending the form back to Resolution Life

- ☐ Have you provided your personal details in section 2?
- ☐ Have you completed all relevant details in section 3?
- ☐ Have you advised your payment method in section 4?
- ☐ Have the owner(s) read and signed section 5 using today's date?
- ☐ Have you completed GreenID certification; or
- ☐ Are you emailing or posting a certified copy of identification?

#### Where to send this form

Mail or email this completed form  
(and any other required documents) to:

Resolution Life Customer Service  
GPO Box 3306  
Sydney NSW 2001  
au.service@resolutionlife.com.au

**Any questions?**  
133 731

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Resolution Life can be contacted at [resolutionlife.com.au/contact-us](https://resolutionlife.com.au/contact-us) or by calling 133 731.