



IOOF ESSENTIAL

1 July 2019

Insurance Tele Interview Request Form

This form should be used by a new or existing member (Applicant) of IOOF Essential Super to apply for insurance over the telephone. The Applicant will be guided through an insurance application by a TAL Tele Service Consultant at a scheduled time, which takes between 15-30 minutes, depending on any disclosures the individual Applicant may have.

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** and **3** boxes where provided.

Step 1: Applicant details

Are you applying as a New Member or an Existing Member?

- New member
 Existing member

Account number (to be completed by Existing Members only)

Title (Dr/Mr/Mrs/Ms/Miss) Surname

Given name(s)

Residential address

Suburb State Postcode

Email

Date of birth / / Gender Male Female

Are you an Australian resident? Yes No

Tele Interview Request details

Phone (bh) Mobile

Best day to call (Monday – Friday) Best time to call (8:30am – 4:00pm) : am to : pm

Occupation details

Employer's name

Occupation

Annual salary/remuneration package (gross)* \$

* This comprises your current annual wage or salary, plus commissions, plus all other regular cash and non-cash payments and benefits provided to you or for your benefit by your employer.

Employment status

Part time Hours worked per week (less than 15 hours)*

Full time Hours worked per week (15 hours and over)

Casual/Contractor

Other

* To be eligible to apply for income protection you must be permanently employed and working more than 15 hours per week.

Please provide details of your daily duties (eg, clerical, light manual, counter sales, manual work, etc.)

Step 2: Death or Death & Total Permanent Disablement (TPD) cover

Do you have existing Death or Death & TPD cover with TAL?

No

Yes. If yes, what is your existing sum insured?

Death cover \$

Death and TPD cover \$

Please specify the total amount of cover you wish to apply for (including any existing cover):

Fixed dollar cover

Total Death cover \$ OR \$:

Total Death and TPD cover \$ OR \$:

Please note: TPD cover is unavailable without Death cover. You must apply for Death & TPD cover if you wish to have TPD cover. The TPD cover cannot exceed the amount of Death cover.

Step 3: Income protection cover

Do you have existing Income Protection with TAL?

No

Yes. If yes, what is your existing cover?

Income level (% of salary)

Waiting period (days)

Benefit payment period

Do you wish to apply for income protection?

No (go to Step 4)

Yes

Please note: You can have a monthly benefit of up to 75 per cent of your monthly salary plus an optional superannuation contributions benefit up to 10 per cent of your monthly salary not exceeding \$30,000 per month.

Specify cover required (mandatory information)

Income level (% of salary) 50% 66²/₃% 75% Other (up to 75%)

Waiting period (days) 30 60 90

Benefit payment period 2 years 5 years to age 65

Specify cover required (mandatory information)

Would you like the Superannuation Contributions benefit? Yes No

Income level (% of salary) % (up to 10% of your salary)

Step 4: Financial Adviser details

Adviser number

Name

Phone (bh)

Email

Please send the completed form directly to TAL Life Limited

Email grouptele@tal.com.au
Fax 02 9465 2065
Post GPO Box 5380, Sydney, NSW 2001

The information in this form will be used to set up an insurance interview with you over the phone. The way in which the Trustee (IOOF Investment Management Limited, ABN 53 006 695 021, AFSL No. 230524 (IIML)) and the Insurer (TAL Life Limited) handle your personal information (including any sensitive health or financial information you provide) is set out in the Trustee's and Insurer's privacy policies available respectively at www.ioof.com.au/privacy and www.tal.com.au/Privacy-Policy. This document has been prepared and issued by IIML as trustee for the IOOF Portfolio Service Superannuation Fund (Fund). Please refer to the eXpand Super Insurance Guide and Product Disclosure Statement for details of the terms applicable to insurance cover available through the Fund.