

INSURANCE - MEMBER REQUEST

NAME OF FUND

To be completed by each fund member if insurance cover provided on request only

(attach additional page if insufficient space below)

Member Name: _____

- After considering my personal circumstances, I have decided not to take out insurance cover via the fund.
- After considering my personal circumstances, I would like to consider taking out insurance cover via the fund. I would like details on the following types of cover in the following amounts:
- | | |
|---|---------------|
| <input type="checkbox"/> Life (incl Terminal Illness) | \$ _____ |
| <input type="checkbox"/> Total & Perm. Disablement | \$ _____ |
| <input type="checkbox"/> Income Protection | \$ _____ p.a. |

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Member's Signature

Date:

Member Name: _____

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Disclaimer:

All trustees are required to document their strategy for the making and holding of investments, in writing. Trustees are also required to implement their strategy by making investments in accordance with it. Based on the details provided by you in this Investment & Insurance Strategy Questionnaire, and the relevant superannuation legislation, we will prepare an Investment & Insurance Strategy Statement.

SMSF Options Pty Ltd is not licensed to provide financial product advice under the Corporations Act 2001. Taxation is only one of the matters that must be considered when making a decision on a financial product and trustees of superannuation funds should consider taking advice from the holder of an Australian Financial Services licence before making a decision on a financial product.