

Age Pension+ Option election

Use this form to elect the Age Pension+ Option for your Allianz Guaranteed Income for Life (AGILE) investment.

If you have any queries about completing this form, please call us on 1300 371 136 between 8.30am and 5.30pm (AET), Monday to Friday, or email us at administration@allianzretireplus.com.au.

Important:

- You must select the Age Pension+ Option at the the earliest of commencing the Lifetime Income from AGILE or for superannuation investments meeting a Relevant Condition of Release (including reaching age 65) or for nonsuperannuation investments reaching Pension Age.
- Your decision to elect the Age Pension+ Option is irrevocable, and cannot be changed at a later date.
- The Age Pension+ Option is not available to non-superannuation trustee or company investors, except for investments via a Platform.
- Please refer to the Allianz Guaranteed Income for Life PDS for more information about how this election may affect your investment including, for example, access to your Investment Value, available withdrawal amounts, lifetime income rates and any death benefit payable.
- Whether Age Pension+ Option is suitable for you will depend on your personal circumstances. We recommend you speak to an authorised financial adviser before making this election.

Investment Number

Investor Name

Phone number

Email address

1. Age Pension+ Option election

If you would like to elect the Age Pension+ Option, please complete the following:

I would like to elect the Age Pension+ Option

If you know the date that the Life Insured will meet a Relevant Condition of Release for superannuation investments or reach Pension Age for non-superannuation investments, you may advise us below, and we will ensure the Age Pension+ Option will take effect on that date.

Superannuation

When is the earliest that the Life Insured will meet a Relevant Condition of Release?

I have already met a Relevant Condition of Release

I will meet a Relevant Condition of Release on:

 / /

Please confirm the Relevant Condition of Release that the Life Insured has met/will meet:

I have reached my preservation age and have retired

I have attained age 65

I have been diagnosed with a terminal medical condition

I am permanently incapacitated

Non-superannuation

When is the earliest that the Life Insured will meet Pension Age?

I have already met Pension Age

I will reach Pension Age on:

 / /

2. Authorisations

The information we collect on this form will be used to update your investment details affected from the earlier of the date you meet a relevant condition or release, or commence your Lifetime Income.

Please note that we may contact you for further information to support the relevant condition of release being met.

I/we declare that:

- The details provided in this form are true and correct.
- Where signing under a power of attorney, the attorney confirms that no notice of revocation of that power has been received. An original certified copy of the power of attorney, including the appointed attorney's signature, must be lodged with this form if it has not previously been supplied.
- I/we agree that the Company cannot be held liable for any loss that I/we may incur if it can't process my/our application because I/we have not provided enough correct information.

Investor / Attorney

Signature

Full name

Date

Second signatory (if applicable)

Signature

Full name

Date

You can send your form in one of the following ways:



Post

Allianz Australia Life Insurance Limited
Reply Paid 89484, Sydney NSW 2001



Scan and email

administration@allianzretireplus.com.au