Allianz Retire+
POWERED BY PIMCO

Change of Adviser Details Form

Use this form to change financial adviser details or adviser service fees.

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.

Policy/Investment number

Policy owner / Investor name

Phone number

Email address

1. Financial adviser

By completing this form you acknowledge that any adviser service fees in relation to your policy/investment will be paid to your financial adviser's Australian financial services licensee, and that the details of your policy/investment may be provided to that licensee or your financial adviser.

Select the type of change you would like to make

☐ **Remove my financial adviser from my policy/investment**

☐ **Change my adviser to**

New adviser details

Title | First name | Middle name | Surname

Phone

Email

Authorised representative *(if different from above)*

Adviser number *(AR number)*

AFSL name

AFSL number

☐ **Change my ongoing adviser service fee**

Ongoing adviser service fee $ ________ p.a. or ________ % p.a. *(Percentage of Account Balance / Investment Value anniversary date)*

You authorise the payment of the above ongoing adviser service fee, and acknowledge that it is an ongoing arrangement that will continue until you inform us otherwise.

☐ **Stop my ongoing adviser service fee**

Allianz Australia Life Insurance Limited (AALIL), ABN 27 076 033 782, AFSL 296559 | www.allianzretireplus.com.au | 1300 371 136 trading as Allianz Retire+ is the product issuer. PIMCO Australia Pty Ltd, ABN 54 084 280 508, AFSL 246862 (PIMCO Australia) is not the issuer or promoter of any Allianz Retire+ product, and therefore does not warrant the performance of any Allianz Retire+ product. PIMCO Australia provides investment management and other support services to AALIL.

Please note:

For **Future Safe** customers, adviser service fees (ASFs) will reduce the Free Withdrawal Amount (FWA) available and will attract a Market Value Adjustment charge if the FWA is exceeded.

For **AGILE** investors, in the Growth Phase, the ongoing adviser service fees reduce your Free Withdrawal Amount available and will attract the MVA if the Free Withdrawal Amount is exceeded if within the first 10 years of the investment. The maximum ongoing adviser service fee you can ask us to pay to your financial adviser is 2.2% (incl. GST) of your Investment Value at each Anniversary Date.

In the Lifetime Income Phase, withdrawals to pay ongoing adviser service fees will be facilitated out of regular Lifetime Income payments. The maximum ongoing adviser service fee you can ask us to pay your financial adviser is 30% of the Lifetime Income Payment calculated at each Anniversary Date.

Please see the relevant PDS for further information in relation to paying adviser service fees.

2. Authorisations

The information we collect on this form will be used to update your policy/investment details.

I/we declare that:

- The details provided in this form are true and correct.
- If I am signing on behalf of a company as a "Company Officer" and as a sole signatory, then I am signing as a sole director and secretary of the company.
- 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 release and indemnify Allianz Australia Life Insurance Limited (AALIL) against any liabilities that may arise out of AALIL acting on any incorrect information received in writing or electronically from me.

Investor 1/Company Officer/Attorney

Signature

Full name

Date

/ /

Investor 2/Company Officer/Attorney *(if applicable)*

Signature

Full name

Date

/ /

If you are providing original certified documents with your form, you can only send these by post, otherwise 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

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.

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