



## Insurance Tele Interview Request Form

- IOOF Employer Super
- IOOF Personal Super

This form should be used by a new or existing member (Applicant) of IOOF Employer Super or IOOF Personal 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 (except for your email address) and ✓ 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%     66⅔%     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)             Mobile   

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

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