

Insurance Tele Interview Request Form

This form should be used by a new or existing member (Applicant) of an IOOF platform product (Pursuit, IOOF Portfolio Service or LifeTrack) to apply for insurance over the telephone. The Applicant will be guided through an insurance application by a TAL Tele Interview consultant at a scheduled time, which may take up to 45 minutes, depending on the health and lifestyle of the individual Applicant.

Please complete these instructions in BLACK INK using CAPITAL LETTERS (except your email address) and ✓ boxes where provided.

Step 1: Applicant details

Are you applying as	s a New Member or an Existing Member?	
New member		
Existing member	Account number (if known)	
IOOF platform product		
Title (Dr/Mr/Mrs/Ms/Miss)	Surname	_
Given name(s)		
Residential address		
Suburb	State Postcode	
Email		
Date of birth	Are you an Australian resident? Yes No	
Gender	Male Female	
Tele Interview Requ	uest details	
Phone (business hours) Best day to call (Monday – Friday) Best time to call	Phone (mobile)	
(8.30am – 4.00pm)	: am/pm until am/pm	

Occupation details		
Employer's name		
Occupation Annual salary/remuneration Dackage (gross) ¹ \$		
This comprises your current annual wage or salary, plus commissions, plus all other regular cash and non-cash payments and benefits provided to y benefit by your employer.	ou or for y	/our
Employment status Full-time Hours worked per week Less than 15 hours* 15 hours and over Casual/contractor Other To be eligible to apply for income protection you must be employed and working 15 hours or more per week.		
Please provide details of your daily duties and the percent of time doing each (such as clerical, light manual, counter sales, mar	nual wor	k, etc.)
Description of your duties (eg Clerical) Percentage of time spent (%) (eg 50%	6)
1.		
2.		
3.		
4.		
5.		
6.		
Step 2: Death or Death & Total and Permanent Disablement (TPD) cover Do you have existing Death or Death & TPD cover with TAL?		
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 existing cover):		
Fixed dollar cover		
Total Death cover \$		
Total Death and TPD cover \$		
Please note: TPD cover is unavailable without Death cover. You must apply for Death & TPD cover if you wish to have TPD cover.	er.	

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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) Please note: Maximum benefit is 75% of salary or \$30,000 per month (please refer to your Insurance Guide/Fact Sheet), whichever is the lesser Specify cover required (mandatory information) Income level (% of your Salary) up to 75% Waiting period (days) 2 years to age 65 Benefit payment period Superannuation contributions benefit (optional) Do you want the superannuation contributions benefit? Income level (% of your Salary) (up to 10% of your Declared Earned Income, limited to the actual level of contribution made) Step 4: Financial Adviser details Adviser number Name Phone Phone (mobile) (business hours) 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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