

Nomination of Beneficiaries

Privacy Act 2020

'We' and 'us' refers to Momentum Life Limited and 'you' refers to the Policy Owner.

This form collects personal information about the people named on this form. Each person has the right of access to, and correction of, their own personal information. The personal information and any additional information obtained, (including medical information if required) will be used by us and our officers, employees and agents to assess and administer the claim. The information may also be used for statistical purposes provided the person is not identified. We will take all reasonable steps to keep this information secure.

The information may be disclosed outside of Momentum Life where the disclosure is necessary for one or more purposes for which the personal information was collected, to agents, representatives, organisations, or contractors who provide services to us in connection with the administration of products or services, for the purpose of customer satisfaction surveys, or where permitted by law. If you or a nominated beneficiary has any query about privacy, please contact

Momentum Life by calling 0800 108 108 (Mon to Fri, 9am - 7pm NZST) or emailing customercare@momentumlife.co.nz. You can read our full Privacy Policy on our website at momentumlife.co.nz/privacy-policy.

As the Policy Owner, you have the option to nominate a beneficiary or beneficiaries to receive Benefits payable under your Policy, upon your death. The option to nominate a beneficiary is subject to the completion and return of this Nomination of Beneficiaries Form to Momentum Life and to the conditions listed below.

The following conditions apply to your nomination:

- Nominations can be made in the initial application or by subsequently completing this Nomination of Beneficiaries Form.
- You can nominate a maximum of five beneficiaries (who must be natural persons).
- You must specify, as a percentage, how you would like to divide the Benefit between the nominated beneficiaries.
- We make all Benefit payments to you as the Policy Owner, or in the case of your death to

the beneficiary/ies you have nominated.

- Payment of a Benefit to the beneficiary/ies will be made on the basis of the latest valid nomination received and processed by Momentum Life.
- If a nominated beneficiary is a minor when the payment is made, it will be made to the minor's legal guardian.
- If a nominated beneficiary dies before the Policy Owner, the nomination of that beneficiary ends. Their share of the Benefit will then be proportionally distributed to the remaining beneficiary/ies, unless the Policy Owner updates the Beneficiaries nomination.

You can make a new nomination at any time by one of the following:

- Completing this Nomination of Beneficiaries Form;
- Downloading & completing a form at momentumlife.co.nz; or
- Calling 0800 108 108 and requesting a form.

Your new nomination takes effect when a properly completed and signed Nomination of Beneficiaries Form is received and processed by Momentum Life.

Policy Owner:		Policy number:	
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Full name of beneficiary	Address & phone number	Date of birth	Relationship	% Split
				%
				%
				%
				%
				%
Total percentage must equal 100%				= 100%

Signature of Policy Owner:		Date:	<input type="text"/> / <input type="text"/> / <input type="text"/>	
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Please return the completed form to Momentum Life. You can either:

1. Scan & email it (with your name & policy number as the subject line) to customercare@momentumlife.co.nz; or
2. Mail it to Momentum Life, PO Box 99892, Newmarket, Auckland 1149.