

Age Pension+ Option election

Use this form to elect the Age Pension+ Option for your Allianz Guaranteed Income for Life (AGILE) investment. This form is not applicable to non-superannuation trustee or company investors.

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:

- If electing the Age Pension+ Option for your Allianz Guaranteed Income for Life (AGILE) investment, it must be made upon the earliest of:
 - commencing Lifetime Income from AGILE, or
 - the Life Insured meeting a Relevant Condition of Release¹ (including reaching age 65) for superannuation investments, or
 - the Life Insured reaching Pension Age (67) for non-superannuation individual investments.
- For more information about how this election affects your investment, visit the Allianz Retire+ website at www.allianzretireplus.com.au and refer to the Allianz Guaranteed Income for Life Product Disclosure Statement (PDS).
- Whether the Age Pension+ Option is suitable will depend on your personal circumstances. We recommend you speak to an authorised financial adviser before making this election.

Your decision to elect the Age Pension+ Option is irrevocable – you cannot change this at a later date.

1. Details of your investment

Investment Number

Investor Name

Phone number

Email address

2. Age Pension+ Option election

I am an individual investor

- ☐ I elect the Age Pension+ Option be applied to the investment mentioned above upon the earlier of reaching Pension Age (67) or commencing Lifetime Income from AGILE.

I am a self-managed superannuation fund (SMSF) trustee investor

Choose ONE of the options below. For information on Relevant Conditions of Release¹, refer to the PDS.

- ☐ I elect the Age Pension+ Option be applied to the investment mentioned above in the event the Life Insured has not previously met another Relevant Condition of Release and they reach age 65.
- ☐ I elect the Age Pension+ Option be applied to the investment mentioned above as the Life Insured met a Relevant Condition of Release on / /

¹ A Relevant Condition of Release is defined in the PDS as the following conditions which are applicable for asset-tested income streams (lifetime): (a) retirement, (b) death, (c) terminal medical condition, (d) permanent incapacity and (e) attaining the age of 65.

3. Declaration and signature

The information we collect on this form will be used to update your investment details effective from the earliest of the date the Life Insured meets a Relevant Condition of Release (including reaching age 65), reaches pension age (67) or commences the Lifetime Income (as applicable). Please note, if you are an SMSF trustee we may contact you for further information to support the Relevant Condition of Release being met.

By signing the below, I/we declare that:

- The details provided in this form are true and correct.
- I/we acknowledge that the decision to elect the Age Pension+ Option is irrevocable and cannot be changed at a later date.
- I/we understand that electing the Age Pension+ Option will affect withdrawals, any benefit payable on death and lifetime income rates.
- Where signing under a power of attorney, the attorney confirms that they have not received notice of revocation of that power. 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 Allianz Australia Life Insurance Limited cannot be held liable for any loss that I/we may incur if it cannot process my/our application because I/we have not provided enough correct information.

Person 1

Signature

Full name

Date

Person 2 (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