

**PLEASE NOTE: IF ANY OF THESE DETAILS ARE MISSING, INVESTMENT WILL BE GIVEN ON
DATE FINAL REQUIREMENT RECEIVED.**

Single Premium top up and Transfer Quality Checklist – All products

Seller Code: _____

LARC No: _____

SINGLE PREMIUM TOP UP

- | | | |
|------------------------------|-----|----|
| • Fund choice: | YES | NO |
| • Commission choice: | YES | NO |
| • Employer / Employee split: | YES | NO |

TRANSFERS

- | | | |
|---|-----|----|
| • Fund choice: | YES | NO |
| • Commission choice: | YES | NO |
| • Employer / Employee split: | YES | NO |
| • Has Transfer details form been completed: | YES | NO |
| • Source of Transfer: | YES | NO |

***These are the current requirements and are subject to change – we reserve the right
to ask for further requirements***