

Funeral Trust Application Form

Client name: Mr / Mrs / Miss / Miss (please circle one) _____

Existing client?	Yes <input type="checkbox"/> No <input type="checkbox"/>	CRM no.:
Address	Street address:	Suburb:
	Town/City:	Postcode:
Home phone		
Work phone		
Mobile		
Email address		
Date of birth		
Preferred funeral director (if any)		
Do you have an existing Perpetual Guardian Will?		
If not, where is your Will held?		

Funeral Trust settlement details

- I hereby apply to establish a Funeral Trust for the purpose of payment of my funeral expenses.
I wish to settle the following lump sum amount:
- \$ _____ ((initial minimum \$3000)
(Please attach your cheque and add the \$150 establishment fee to your amount)
- The terms and conditions of my Funeral Trust shall be as set out in the Funeral Trust Deed dated 9 November 2000, executed by The New Zealand Guardian Trust Company Limited.
- I acknowledge my Funeral Trust will be settled and established upon acceptance of this application form and my payment.

Privacy Act 1993 Disclosure

The information supplied by you will be retained by Perpetual Guardian in terms of the Privacy Act 1993 and will be used in arranging or administering any product or service provided to you. You have the right to see all personal information held about you by Perpetual Guardian. If the information held about you is inaccurate, you have the right to request a correction.

With your consent, such information may be used to further our relationship with you. This includes the provision of products, services or information that will be of interest. This may be in the form of client newsletters, brochures or offers sent by post or email.

Subject to any statutory or regulatory requirements, the information held will not be disclosed without your consent to anyone outside of Perpetual Guardian.

Please tick here if you do not wish to receive communications about other products or services provided by Perpetual Guardian (either by post or email).

Acknowledgement

• I have read and understand the Privacy Act 1993 disclosure set out above.

Signed by:

Client name	
Date	/ /