

# Insurance upgrade to management/clerical (white collar) scale form



**When to use this form**

Complete this form to upgrade your insurance cover from the Standard scale to the management/clerical (white collar) scale.

OFFICE USE ONLY

**How to use this form**

- complete Steps 1, 2 and 3.

To upgrade your insurance cover, you must:

- be an existing HOSTPLUS Executive member
- be employed for at least 15 hours a week on an ongoing basis
- work in an office or similar environment
- you do not have a current claim application in progress with HOSTPLUS Executive.

Please complete Steps 1, 2 and 3 providing all the required details and acknowledge the Duty of Disclosure section of this form. Please use BLOCK letters and BLACK or BLUE pen.

## Step 1. Member details

HOSTPLUS Executive membership number\*

Date of birth\*

 /  / 

Gender\*

 Male  Female

 Mr  Mrs  Ms  Miss  Dr  Other

\*Mandatory fields

Full given name\*

Surname\*

Current address\*

Suburb  State  Postcode

Home phone\*

Mobile phone

Work phone\*

Email address

## Step 2. Upgrade your insurance management/clerical (white collar) scale

If you're eligible for Death and TPD insurance cover, you can upgrade from the Standard insurance benefit scale to the management/clerical (white collar) scale insurance benefit scale, so you can increase the value of each unit of cover you currently enjoy – at no extra cost.

I would like to upgrade my HOSTPLUS Executive insurance cover from the Standard scale to the management/clerical (white collar) scale.

Please answer the following questions so we can confirm that you're eligible to upgrade your cover.

Do you work in an office or similar environment?

Yes  No

Are you employed for at least 15 hours a week on an ongoing basis?

Yes  No

Do you spend at least 90% of your working time in an office? For example 34.2 hours out of a 38-hour working week.

Yes  No

Do you work in any of the following occupations?

Management  Clerical  Marketing  Administration  Accounting

Other sedentary occupation that will need to be agreed to by the insurer – please specify job title and main duties.

All other occupations, (for example chef or waiter) fall outside the definition of management/clerical (white collar) scale duties and are subject to the standard scales.

### Step 3. Sign the declaration

*This Step must be completed in all circumstances.*

I, whose signature appears below, declare that:

- I have read and carefully considered the questions in this form, and all answers provided are true and correct (including those not in my own handwriting). I have told the insurer everything I know that could affect its decision to accept my application.
- I have read and understood the Duty of Disclosure and Non-disclosure section below. I have not withheld any information that may affect the Insurer's decision as to whether to accept this application. I understand that the Duty of Disclosure continues after I have completed this statement until I am notified of acceptance in writing by the trustee.
- I have read and understood the HOSTPLUS Executive privacy policy (available at [hostplusexecutive.com.au](http://hostplusexecutive.com.au)). I consent to my personal information being collected and used in accordance with the policy.
- I have read the Product Disclosure Statement and/or Insurance Guide.
- I acknowledge that if I do not complete this form correctly and/or I do not sign and date this form, my application will not be considered by the Insurer.
- I understand that increases or changes to insurance premiums will apply and insurance deductions from my account will be adjusted.

**Signature of applicant\***

**Date\***

D	D	/	M	M	/	Y	Y
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**\*Mandatory fields**

*Faced or scanned forms cannot be processed. However photocopied forms can be processed if signed with an original signature.*

*You must complete this form in full, sign and date it above before the Insurer will consider it. This application must be received by HOSTPLUS Executive within 30 days of the date it is signed.*

#### **Important notice**

HOSTPLUS Executive has taken out a contract of insurance with an Insurer to provide the insurance benefits in the Fund. On becoming a member, you are bound by the terms and conditions of this contract of insurance.

#### **Your duty of disclosure**

You have a duty, under the Insurance Contracts Act 1984 to disclose to the insurer every matter that you know, or could reasonably be expected to know, is relevant to the insurer's decision whether to accept the risk of the insurance, and if so, on what terms. Your duty, however, does not require disclosure of a matter:

- that diminishes the risk to be undertaken by the insurer
- that is common knowledge
- that your insurer knows or, in the ordinary course of his/her business, ought to know or
- as to which compliance with your duty of disclosure is waived by the insurer.

#### **Non-disclosure**

If you fail to comply with your duty of disclosure and the insurer would not have entered into the contract on any terms if the failure had not occurred, the insurer may avoid the contract within three years of having entered into it. If your non-disclosure is fraudulent, the insurer may avoid the contract at any time. An insurer who is entitled to avoid a contract of life insurance may, within three years of entering into it, elect not to avoid it but to reduce the sum insured you have been insured for in accordance with a formula that takes into account the premium that would have been payable if you had disclosed all relevant matters to the insurer.

When you have completed this form please send it to:

HOSTPLUS Executive  
Locked Bag 969  
Carlton South VIC 3053

or give it to your employer to send with their next contribution to the fund.  
You will be sent a HOSTPLUS Executive membership card, along with any other information you have requested on the form.

Issued by Host-Plus Pty Limited ABN 79 008 634 704  
Australian Financial Services Licence No. 244392  
Registrable Superannuation Entity Licence No. L0000093  
Registrable Superannuation Entity No. R1000054