



Insurance Tele Interview Request Form

This form should be used by a new or existing member (Applicant) of an IOOF platform product (Pursuit, IOOF Portfolio Service or LifeTrack) to apply for insurance over the telephone. The Applicant will be guided through an insurance application by a TAL Tele Interview consultant at a scheduled time, which may take up to 45 minutes, depending on the health and lifestyle of the individual Applicant.

Please complete these instructions in BLACK INK using CAPITAL LETTERS (except your email address) and ✓ boxes where provided.

Step 1: Applicant details

Are you applying as a New Member or an Existing Member?

New member

Existing member

Account number (if known) - -

IOOF platform product

Title (Dr/Mr/Mrs/Ms/Miss) Surname

Given name(s)

Residential address

Suburb State Postcode

Email

Date of birth / / Are you an Australian resident? Yes No

Gender Male Female

Tele Interview Request details

Phone (business hours) Phone (mobile)

Best day to call (Monday – Friday)

Best time to call (8.30am – 4.00pm) : am/pm until : am/pm

