

GUIDE TO IDENTITY CERTIFICATION



The purpose of this guide is to provide an overview of the reason we require proof of your identity and the identity documents we accept.

Why do I need to prove my identity?

For your security, we need to make sure you're the rightful owner of the life insurance plan, or are authorised to act on behalf of the plan owner, before we can release certain information or perform certain transactions.

How do I provide proof my identity?

To provide your proof of identity to us, you must send us a photocopy of your original identification documents – for example your driver's licence or passport – that have been certified by an authorised person. All acceptable identification documents must show your name and residential address.

Simply take a photocopy/s (copy) of your original identification document/s and then arrange for an authorised person to certify your document, following the process outlined in Step 2 below. Once complete please email or mail us the certified copy/s. Please don't send us the originals of your document/s, only the certified copy/s.

Questions

If you have any questions in relation to this guide, please don't hesitate to contact us on 1300 090 188 or email us at claims@neoslife.com.au.

Step 1. Acceptable identification documents

We'll accept one identification document from List A OR two documents from List B.

List A – provide one document	OR	List B – provide two documents
Current Australian driver's licence OR Current Australian passport		One of these: <ul style="list-style-type: none">• Birth Certificate, extract or birth card• Citizenship Certificate• Pension Card issued by Centrelink (entitles person to financial benefits). AND One of these: <ul style="list-style-type: none">• Letter from Centrelink regarding a Government assistance payment (less than 12 months old)• Australian Taxation Office notice of assessment (less than 12 months old)• Rates notice (less than 12 months old).

Step 2. Arrange an authorised person to certify your copy/s of your identification document/s

To certify your acceptable document/s, the authorised person needs to:

1. Compare the photocopy to the original document.
2. Include the following details on the copy/s:
 - a. stamp/write: 'This is a true and correct copy of the original'
 - b. their qualification
 - c. their name
 - d. their address and phone number; and
 - e. their signature and the date it was signed.

If you've changed your name

You'll need to prove your name change by providing a certified copy of one of these as an acceptable identification document:

- Marriage certificate
- Deed poll
- Change of name certificate from the Births, Deaths and Marriages Registration Office.

If you're signing on behalf of another person

You'll need to prove the link between you and the other person by providing a certified copy of one of these as an identification document:

- Guardianship papers
- Power of Attorney.

Step 3. Who can certify your acceptable document/s

The below provides information about who (i.e. an authorised person) can certify copies of your original identification document/s.

A person can **certify copies** of your original acceptable identification document/s if they are:

- an Australian citizen, and
- not related to you by birth, marriage or de facto relationship, and
- currently working in a profession or occupation listed below.

Designated list of occupations and professions

1. Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
Contact the Australian embassy or consulate to check whether this service is available.
2. Bailiff
3. Bank officer with five or more years' of continuous service
4. Building society officer with five or more years' of continuous service
5. Chiropractor (licensed or registered)
6. Clerk of a court
7. Commissioner for Affidavits
8. Commissioner for Declarations
9. Credit union officer with five or more years' of continuous service
10. Dentist (licensed or registered)
11. Fellow of the National Tax Accountant's Association
12. Finance company officer with five or more years' of continuous service
13. Judge of a court
14. Justice of the peace
15. Legal practitioner (licensed or registered)
16. Magistrate
17. Marriage celebrant licensed or registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
18. Master of a court
19. Medical practitioner (licensed or registered)
20. Member of Chartered Secretaries Australia
21. Member of Engineers Australia, other than at the grade of student
22. Member of the Association of Taxation and Management Accountants
23. Member of the Australian Defence Force with five or more years' of continuous service
24. Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
25. Member of the Parliament of the Commonwealth, a State, a Territory Legislature, or a local government authority of a State or Territory

26. Minister of religion licensed or registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
27. Nurse (licensed or registered)
28. Optometrist (licensed or registered)
29. Permanent employee of Commonwealth, State or local government authority with at least five or more years' of continuous service
30. Permanent employee of the Australian Postal Corporation with five or more years' of continuous service
31. Pharmacist (licensed or registered)
32. Physiotherapist (licensed or registered)
33. Police officer
34. Psychologist (licensed or registered)
35. Registrar, or Deputy Registrar, of a court
36. Sheriff
37. Teacher employed on a full-time basis at a school or tertiary education institution
38. Veterinary surgeon (licensed or registered).



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NEOS Life is a registered business name of Australian Life Development Pty Ltd ABN 96 617 129 914 AFSL 502759. NEOS Protection is issued by NobleOak Life Limited (NobleOak) ABN 85 087 648 708 AFSL 247302. NEOS Super Plan is issued by Tidswell Financial Services Limited (Tidswell) ABN 55 010 810 607 AFSL 237628 RSE L0000888 as trustee of both the Max Super Fund ABN 22 508 720 840 RSE R1067897, and the Tidswell Master Superannuation Plan ABN 34 300 938 877 RSE R1004953. NEOS Life provides administration services in relation to NEOS Protection and NEOS Super Plan on behalf of NobleOak and Tidswell, respectively.