Change of Ownership to an individual or a sole trader

How to use this form

This form is for service transfers. If you are changing your name visit **telstra.com.au/changename**

Please complete this form online prior to printing or please PRINT clearly in black pen.

If you are the current owner of the services, complete section 1.

If you are the new owner receiving the services, complete from section 2.

You do not need to complete this form if your request relates to a bereavement or deceased estate. Please contact Telstra on 13 22 00 and say 'Bereavement Support'.

Depending on the complexity of your application, processing times may vary. The transfer of mobile services in store can be completed same day.

Some business products cannot be transferred to individuals or sole traders, please visit telstra.com/changeownership to see if your service is eligible or for more information.

How to submit this form

Scan & Send to:
changeofownership@telstra.com if transferring to an existing or new Telstra personal account.

Fax to: 03 8601 2361

OR return the form to your local Telstra store.

If this request includes a mobile service only and the New Owner has been a Telstra customer for less than 6 months, you must submit this form to your local Telstra store for processing.

Telstra Upfront plans

If the service you are transferring ownership of is on an Upfront plan please read below:

- If you are unsure if your service is an Upfront plan, you can find the details in the My Telstra app or in the Critical Information Summary you were provided when you signed up.
- You will be contacted by Telstra to guide you through this process. If the new owner is or is eligible to be a Priority Assist customer and the service is on an Upfront plan, please call us on 13 22 00 to discuss your options.
- Any device repayments associated with an Upfront plan cannot be transferred to a new owner.
- Any remaining repayments will be charged as an early termination charge to the current account owner and will appear on a 'pay it later' invoice. The only way to pay for Upfront plans is by AutoPay.
- The new owner will be required to sign up with AutoPay at the time of transfer. Transfers for Upfront plans will require the new owner to obtain a new SIM card during the transfer process. The new owner will require a Telstra ID to manage their service online.

Identification

The current and new owner will need to provide at least one form of PRIMARY identification (e.g. Australian Driver's Licence or Australian Passport).

If the new owner has been a customer for less than 6 months or is new to Telstra, they'll need to provide details of additional identification. The application cannot proceed if this is not provided. Don't send copies of identification with this form.

For more information on what ID you can provide to Telstra, including a comprehensive list of acceptable Identification, please visit telstra.com/idcheck.

Change of Ownership

Section 1A - about the current owner

Individual Owner Name

Title (Mr, Mrs, etc.)

OR

Company name (as per ASIC) - if applicable

ACN

Business or trading name

ABN/ARBN

Please read the Appendices from page 10 for further information about services to be transferred.

You must be the Legal Lessee/Full Authority or Authorised Representative, as listed on your Telstra account, to sign and approve this Change of Ownership or Transfer of Lease form.

Please ensure you can be contacted on the contact number and email address you provide below after the transfer has taken place.

You can list individual service numbers or account numbers (found on your Telstra bill, for those customers who receive one).

- If you list service numbers, you are agreeing to transfer only those individual services to the new owner. (All services within a bundle will transfer, please refer to Appendices for more information.)
- If you list account numbers, you are agreeing to transfer all services on those accounts to the new owner.
- BigPond Mailboxes and Telstra Mail services can't be transferred. Ownership will remain with the current owner.

Service or account numbers

Please attach additional service or account numbers on a separate sheet if required.

Transfer date (for all services or accounts listed)

What date should the transfer of services or accounts take effect? DD/MM/YYYY

Please select a transfer date between 7 and 30 business days from the date that this form is submitted to Telstra.

Identification

Primary ID (e.g. Australian Driver's Licence or Australian Passport.)

Type

State of issue

Number

Change of Ownership

Final Bill

If you are transferring all services on your account, once the Change of Ownership or Transfer of Lease has taken effect, we will send you a Final Bill for your service. If you are on an Upfront plan, following the transfer of this service, this will be reflected in next invoice. If you have a device repayment option this will include a 'pay it later' invoice for the remaining balance of the device.

If you would like your Final Bill to be issued to an address different to the one currently listed against your account, please provide this new address below (not applicable for Upfront plan services):

Level/Unit no. etc. | Street address | Postcode

Please note, if you are retaining services on your account, you will continue to receive your bills at your nominated email or address. You can update your billing details via your Telstra My Account or the My Telstra app.

Section 1B – the current owner agreement for transfer of services

I warrant that I am the Legal Lessee, Full Authority or Authorised Representative authorised to make this request on behalf of the current owner.

I have read and understand all statements made in this application form, including the Terms and Conditions on page 10.

I am requesting that the legal responsibility of the services listed above be transferred to the new owner whose details are included on this form.

Full name

Date of birth DD/MM/YYYY | Contact number ( )

Email address

Signature | Date DD/MM/YYYY

Change of Ownership

Section 2 – about the new owner

Individual Owner Name

Title (Mr, Mrs, etc.)

OR

Trading name

ABN

Mandatory - The Telecommunications Consumer Protections (TCP) Code requires us to collect your primary source of income. Please indicate below your primary source of income (please check box):

- ☐ Permanent full-time employment
- ☐ Permanent part-time employment
- ☐ Casual employment
- ☐ Another family member
- ☐ Centrelink (Pension - Aged, Veterans, Disability, etc.)
- ☐ Centrelink (Benefits/Allowances - Newstart, Youth Allowance, etc.)
- ☐ Superannuation/Annuities
- ☐ Investments (Interest/Dividends/Rent/Capital Gains)
- ☐ Business/Partnership/Trust Profits

Are you already a Telstra Customer?

☐ Yes ☐ No If yes, please provide your service or account number

If Yes, complete details below. If No, proceed to Section 3A.

If you are already a Telstra customer, would you like the services to be transferred to EITHER your existing account number or a new account number in your name?

☐ Existing account number ☐ New account number

Upfront plan customers will receive an invoice by email. If you receive a post-paid service bill, would you prefer to receive your bill via email or as a paper bill? (Charges may apply for paper bills.)

☐ Email ☐ Paper

Address for paper bill if different to current address

State

Postcode

You must be the Legal Lessee, Full Authority or Authorised Representative, as listed on your Telstra account, to sign and approve this Change of Ownership or Transfer of Lease form.

Existing Telstra customers continue to Section 4.

Change of Ownership

Section 3A – opening a new personal or sole trader account

We require some of your personal details in order to complete a credit assessment.
Your application cannot proceed if this information is not provided.

Total number of dependants

Current address

Level/Unit no. etc. Street address Postcode

Residential status

Rent Own Other

Duration at current address

Previous address, if less than 5 years at current address (must be a fixed site; cannot be a PO Box address, etc.)

Level/Unit no. etc. Street address Postcode

Occupation

Section 3B – employment details

Are you self-employed or a sole trader?

Yes, trading name **now continue to Section 4.**

No, please complete employer's details

Employer name

Employer address

Phone number Duration with current employer

( )

If less than 5 years, duration with previous employer

Now proceed to Section 4.

Change of Ownership

Section 4 – all new account owners

Identification

Primary ID (e.g. Australian Driver's Licence or Australian Passport.)

Type | State of issue | Number

Secondary ID (e.g. Medicare Card.)

Type | Number | Expiry date DD/MM/YYYY

Medicare Card Only: Name and Individual Reference Number (IRN)

Your Bill (For eligible services, please note, Upfront plan services do not receive bills.)

Do you want to receive your bills via:

☐ Email @ OR

☐ Paper (charges may apply for paper bills) OR

☐ Other (braille, A3...)

Directory Listing

Your Directory Listing setting determines whether your name, address and phone number will be included in the printed and online White Pages® and Directory Assistance.

Directory Listing option

☐ List my details – Your details will be published in the printed and online White Pages and available via Directory Assistance (the default option for Upfront plans is 'unlisted', you can change this in 'My Telstra').

☐ Do not list my details – Your details will not be published in the printed and online White Pages® or available via Directory Assistance.

Caller Identification

Your Caller Identification setting determines whether your phone number is visible to people when you call from your landline.

☐ Caller ID On – Your Caller ID will be visible when you call others.

☐ Caller ID Off – Your Caller ID will not be visible when you call others.

Change of Ownership

Priority Assist

Telstra offers a priority assistance service for customers (and those that live with them) who:

- Have been diagnosed with a life-threatening medical condition with a high risk of deterioration; and
- Whose life may be at risk without access to a fully operational standard telephone service

If you require access to the Priority Assist service, and the service is on an Upfront plan, please call us on 13 22 00 to discuss your options. For all other plans you must:

- Fill in the details of the service number that requires the Priority Assist access below before you submit this Change of Ownership form; and
- Complete the Priority Assist form and submit it along with any required documentation to the email, fax or post details on the form within 28 days of submission of this Change of Ownership form.

You can obtain a copy of the Priority Assist application form by:

- Going to **telstra.com** and searching 'Priority Assist'
- Contacting Telstra on **13 22 00**
- Going into a Telstra store

Priority Assist covers one home phone line per premises, excluding services on Upfront service plans, please contact Telstra on 13 22 00 to discuss your options. If you have multiple premises, please complete this Change of Ownership form and submit the Priority Assist form for each phone line requiring Priority Assist.

☐ I am eligible for Priority Assist access on service number: _____

As part of your Change of Ownership request we will provide you with provisional Priority Assist access until your Priority Assist application form has been received and approved.

Should we determine you are not eligible for Priority Assist, we may charge you additional fees for the period of time you received the provisional Priority Assist service.

Note: Please be aware that the Priority Assist service will be added on the date of the service transfer (minimum of 7 working days). If you currently do not have access to a reliable mobile phone service that can be used in the event of an emergency while we are progressing the Change of Ownership request, please call Telstra on **13 22 00** so we can ensure you have an alternative working service.

Change of Ownership

Section 5 – new owner agreement for the transfer of services

I have read and understand this application form, including the Terms and Conditions on page 10.

I warrant that I am the Legal Lessee, Full Authority or Authorised Representative of this account, authorised to make this request on behalf of the new owner.

I am requesting that the legal responsibility of the services listed above be transferred from the current owner, to me, the new owner.

Title (Mr, Mrs, etc.)

Full name

Date of birth

DD/MM/YYYY

Contact number

( )

Email address

Signature

Date

DD/MM/YYYY

Section 6 - services to be transferred

- Services to be transferred can include but not limited to:
  - Landline services;
  - Mobile services (including leased services);
  - Internet (Fixed and Wireless).

- Upfront services:
  - Any device repayments associated with an Upfront plan cannot be transferred to a new owner. Any remaining repayments will be charged as an early termination charge to the current account owner and will appear on a 'pay it later' invoice.
  - The only way to pay for Upfront plans is by AutoPay. The new owner will be required to sign up with AutoPay at the time of transfer.
  - Transfers for Upfront plans will require the new owner to obtain a new SIM card during the transfer process.
  - The new owner will require a Telstra Digital Identity to manage their service online.
- Some services can't be transferred and will need to be disconnected and a new service set up. Please visit telstra.com/changeownership to find out if your service can be transferred.
- Services with another carrier will not be transferred.
- We suggest the current owner provides the new owner with a copy of the Critical Information Summary provided at the time of connection or you can obtain a copy from telstra.com/personalcis (search Critical Information Summary).
- Please note transferring services may affect the current owner's current pricing and Early Termination Charges (ETC) may be incurred for services still in contract. Please ensure you have checked your plan terms and conditions before proceeding.
- Business services can only be provided to Business customers. These services can be transferred to individuals or sole traders but the Business contracts will be cancelled and early termination charges (ETC) may apply. The current owner will need to pay these charges.
- When services in a bundle are nominated to transfer (e.g. Digital Office Technology (DOT), BizEssentials, Telstra Bundles, etc), all services within the bundle will move to the new owner. If the current owner wishes to move individual services currently under a bundle, please contact your Dealer, Account Representative or Telstra Consumer on **13 22 00** to discuss plan options first.
- To discuss your pricing options after the transfer has taken place, please contact Telstra on **13 22 00**.

Appendices

Customer Terms and Conditions – all owners

I understand and agree that:

- The services listed above, excluding Upfront plans, will be transferred as is along with any additional products attached to those services (e.g. Home Bundles, Entertainer Bundles, etc), all services within the bundle will move to the new owner.
- BigPond Mailboxes and Telstra Mail services can't be transferred. Ownership will remain with the current owner until such time that they choose to cancel the service.
- Consumer services will not be listed in the White Pages after transfer. The new owner may choose to change this via My Telstra after the transfer is completed.
- Priority Assist existing on fixed services will be removed when the service is transferred. New owners, refer to Section 4 for more information.

Customer Terms and Conditions – current owners

In addition to the above, as the current owner of the services to be transferred, I understand and agree that:

- I will remain liable for all debts incurred on the services listed above prior to the date of transfer including any applicable ETCs and the new owner will be liable for all debts incurred on the services listed above from the date of transfer.
- I acknowledge that any device repayments associated with an Upfront plan cannot be transferred to a new owner. Any remaining repayments will be charged as an early termination charge to me and will appear on a 'pay it later' invoice.
- BigPond Mailboxes or Telstra Mail services without an active internet connection, may be charged an ongoing subscription fee.
- For applicable post-paid services where the device repayment is being transferred, I have handed over all related Mobile Devices associated with the services to be transferred to the new owner. Device handover is not required for Upfront plan transfers.
- I have provided a copy of the service contracts associated with all services/accounts included in this transfer request to the new owner.
- Transferring my services may affect my current pricing and that I have checked my plan terms and conditions before agreeing to this transfer.
- Where services can't be retained on the same plan because those plans are no longer available or the new owner is not eligible, Early Termination Charges (ETC) may be applied to my account
- I will lose access to all Message Banks associated with the transferred services and all stored messages will be deleted.
- I will need to cancel the White Pages with Sensis listing for the transferred services separately.
- Acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process.
- If the mobile service being transferred includes a leased device, the lease is transferred to the new owner.

Appendices

Customer Terms and Conditions – new owners

In addition to the above, as the new owner of the services to be transferred, I understand and agree that:

- I have reviewed terms and conditions for the services listed in the transfer, as set out in our Customer Terms and Critical information Summary for those services.
- I will be taking over the services listed above including any and all applicable contracts and that the nominated services will be transferred to my account with the same structure and set up as they currently have, unless the plan is no longer available, in which case I consent to Telstra transferring the service to a reasonably comparable plan on standard pricing with no fixed term contract.
- Should I wish to have the services transferred without an associated contract, I will need to ask the current owner to cancel their contract prior to this Change of Ownership being submitted.
- If this transfer is for an Upfront service I acknowledge that:
  - I will be required to sign up with AutoPay at the time of transfer.
  - Transfers for Telstra Mobile Upfront plans will require me to obtain a new SIM card during the transfer process.
  - I will require a Telstra Digital Identity to manage their service online. Telstra will contact me to arrange.
- If this Transfer includes a StayConnected service, I understand that if the current owner has used both of their exchange/replacement rights for the current 12 month period, I may not be able to exchange or replace the device until the next anniversary of the StayConnected subscription.
- Similarly, if the current owner has exchanged or replaced their device once in the current period, I may only have one right remaining until the next anniversary.
- Where applicable, I have read and agree to the relevant Telstra StayConnected Critical Information Statement. I agree to the terms and conditions for the relevant StayConnected service.

Acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process and that Telstra may, subject to the Privacy Act 1988:

- verify my identifying information (such as my driver's licence or passport) with the document issuer or official record holder; and
- disclose information about me and this application (including information contained in any application for additional services and information about the conduct of my account) to a credit reporting body to obtain credit reporting information about me and to another credit provider or a debt collection agent to collect overdue payments relating to credit owed by me and to notify defaults by me to a credit reporting body; and
- obtain and use information about my creditworthiness (including consumer credit reporting information or a commercial credit report) from a credit reporting body or other business that reports on creditworthiness or from a credit provider to assess any application for services or to collect any overdue payments.