

# Change of Ownership or Transfer of Lease Request Consumer to Consumer



On completion, this form should be scanned and emailed to [changeofownership@telstra.com](mailto:changeofownership@telstra.com) or faxed to **03 8601 2361** or returned to your local Telstra store.

**Please use this form to change the ownership of your services between two Consumer accounts.**

- The **Outgoing Customer** is the customer who currently owns or leases the services.
- The **Incoming Customer** is the customer who will be receiving the services.

Generally, transfers take 7 business days from the date of submission however, depending on the complexity of your application, processing times will vary, visit [telstra.com](http://telstra.com) and search 'Change of Ownership' for more information.

**If this Change of Ownership or Transfer of Lease request includes a Mobile service and the Incoming Customer has been a Telstra customer for less than 6 months, the Incoming Customer must submit this form to their local Telstra store for processing.**

If you submit this request by email or fax, you'll receive a confirmation email that will contain a Telstra Reference Number.

## **Bereavement or deceased estate request**

If your request relates to a bereavement or deceased estate, please contact Telstra on 13 2200 and say 'Bereavement Support'. You do not need to fill in this form.

## **Outgoing Customer Section**

### *Services to be transferred*

- Services to be transferred can include but are not limited to:
  - Home line, fixed services
  - Mobile services (including leases)
  - Internet (fixed and wireless)
  - BigPond services: please provide your main email address, eg. [smith@bigpond.com](mailto:smith@bigpond.com), [@bigpond.net.au](mailto:@bigpond.net.au) or [@telstra.com](mailto:@telstra.com)
  - BigPond security.
- Services with another carrier will not be transferred.
- If there's a Mobile Device contract associated with your service, including leased devices, you'll need to hand this device over to the Incoming Customer at the time the contract is transferred.
- We suggest you provide the Incoming Customer with a copy of the Critical Information Summary provided at the time of connection or you can obtain a copy from [telstra.com](http://telstra.com) (search Critical Information Summary).
- Please note transferring services may affect your current pricing. Please ensure you have checked your plan terms and conditions before proceeding.
- When services in a bundle are nominated to transfer, all services within the bundle will move to the Incoming Customer. If you wish to move individual services currently under a bundle, please contact Telstra on 13 22 00 to discuss plan options first.
- Early Termination Charges (ETC) may be incurred for services still in contract.
- Please provide details of all associated services/accounts to be transferred. A full list of your services and account numbers can be found on your latest Telstra bill or you can contact Telstra on 13 22 00.

### **You can list whole account numbers, individual services or both as required**

- If you list service numbers, you are agreeing to transfer only those individual services to the Incoming Customer.
- If you list account numbers, you are agreeing to transfer all services on those accounts to the Incoming Customer.

**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?

The Transfer Date cannot be earlier than 7 working days from the date that this form is submitted to Telstra. You may nominate a date up to 30 days in the future.

*Outgoing Customer Details*

You must be the Legal Lessee / fully authorised user, 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.

**I warrant that I am the Legal Lessee or a Full Authority authorised to make this request on behalf of the Outgoing Customer.**

Full name

Date of birth

Contact number

Email address

*Identification*

The person authorising this transaction must provide the details of one form of Primary ID as part of this application. This is a legal requirement and must be provided for every change of ownership or transfer of lease request.

**Primary ID**

(eg. Australian Passport, Australian Drivers Licence, Valid Police/Defence Force ID. Valid Shooters/Firearms Licence)

Type

State of issue

Number

For more information on what ID you can provide to Telstra, including a comprehensive list of acceptable primary ID, please visit [telstra.com](http://telstra.com) and search 'Acceptable Identification' or call Telstra on 13 2200.

*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 services.

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

Please note, if you are retaining services on your account, you will continue to receive your bills at your nominated address. Please contact Telstra if you wish to make any additional changes to your billing address.

## Outgoing Customer Agreement

### Terms and Conditions

Please ensure you read and understand all Terms and Conditions before signing.

#### I agree / understand that:

- 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 Incoming Customer is not eligible, Early Termination Charges (ETC) may be applied to my account.
- Where services in a bundle are nominated for transfer (e.g. Home Bundles, Entertainer Bundles etc), all services within the bundle will move to the Incoming Customer.
- BigPond Mailboxes and Telstra Mail services will retain existing and newly received emails, Billing, Payment and Usage history and that these will be available to the Incoming Customer, this also means they will now be able to read emails intended for me
- Any BigPond Mailboxes or Telstra Mail services that will remain on my account without an active internet connection, may be charged an ongoing subscription fee.
- 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.
- The service will not be listed in the White Pages after transfer. Incoming Customer may choose to change this and can discuss this with Telstra before the transfer is completed.
- Priority Assistance existing on fixed services will be removed when the service is transferred.
- I will remain liable for all debts incurred on the services listed above prior to the date of transfer including any applicable ETCs;
- I have handed over all related Mobile devices associated with the contracts to be transferred.
- I have provided a copy of the contract associated with all services/accounts included in this transfer request to the Incoming Customer
- Acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process;
- I agree that I will not seek to recover any loss I have suffered or may suffer (either directly or indirectly) as a result of this transfer.
- I have read and understand all statements made in this application form

**As the Legal Lessee or a Full Authority of the Outgoing Customer, I am requesting that the legal responsibility of the services listed above be transferred to the Incoming Customer whose details are included on this form.**

**Full Name**

**Signature**

**Date**

## Incoming Customer Section

What type of customer are you?

- Existing Telstra Customer** – Please fill in **Existing Telstra Customer** section (Page 4) along with the **Incoming Customer Agreement** section (Page 7)
- New Telstra Customer** – Please fill in **New Telstra Customer** section (Page 5) along with the **Incoming Customer Agreement** section (Page 7)

### Existing Telstra Customer

Would you like the transferred services added to an existing (in the name of an existing customer) or new account number?

- Existing account number
- New Account number (in the name of an existing customer)

You must be the Legal Lessee / fully authorised user, as listed on your Telstra account, to sign and approve this change of ownership or transfer of lease form. I warrant that I am the Legal Lessee or a Full Authority authorised to make this request on behalf of the Incoming Customer.

### Incoming Customer Details

Full name

Date of birth

Contact number

 (  ) 

Email address

Primary Source of Income

- 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

Best time to contact you

- Morning  Afternoon  Evening

Would you prefer to receive you 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

  

### Identification

The person authorising this transaction must provide the details of one form of Primary ID.

Primary ID

(eg. Australian Passport, Australian Drivers Licence, Valid Police/Defence Force ID. Valid Shooters/Firearms Licence)

Type

State of Issue

Number

  

**If you have been with Telstra for less than 6 months and are completing this request for a mobile service, you must complete this request in store. You may be asked to provide additional Secondary ID that adds up to 100 points of identification.**

For more information on what ID you can provide to Telstra, including a comprehensive list of acceptable primary ID, Secondary ID and their point values, please visit [telstra.com](http://telstra.com) and search 'Acceptable Identification' or call Telstra on 13 2200.

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.

Choose your Directory Listing option

- List my details (\$0) – Your details will be published in the printed and online White Pages® and available via Directory Assistance.
- Do not list my details (\$0) – 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.

**Existing Customer (Continued)**

*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 rapid 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, 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.
- 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 132200
  - Going into a Telstra store

Priority Assist covers one home phone line per premises, 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 processing the Change of Ownership request, please call Telstra on 132200 so we can ensure you have an alternative working service

**New Telstra Customer**

If this request includes a Mobile service, this form must be submitted to your local Telstra store for processing.

This application will be subject to a Telstra Credit Assessment. This form will not be processed until approval has been received.

*Incoming Customer Details*

You must be the Legal Lessee / fully authorised user, as listed on your Telstra account, to sign and approve this change of ownership or transfer of lease form.

I warrant that I am the Legal Lessee authorised to make this request on behalf of the Incoming Customer.

Full name  Date of birth

Contact number   Email address

Current address  Duration at current address

Residential status  Rent  Own  Other

Previous address  Duration at previous address

Occupation  Employer name

Employer address

Employer phone number   Duration with current employer  
 Years  Months

Primary Source of Income

<input type="checkbox"/> Permanent full time employment	<input type="checkbox"/> Permanent part time employment
<input type="checkbox"/> Casual employment	<input type="checkbox"/> Another family member
<input type="checkbox"/> Centrelink (Pension - Aged, Veterans, Disability etc)	<input type="checkbox"/> Centrelink (Benefits/Allowances - Newstart, Youth Allowance etc)
<input type="checkbox"/> Superannuation/Annuities	<input type="checkbox"/> Investments (interest/Dividends/Rent/Capital Gains)
<input type="checkbox"/> Business/Partnership/Trust Profits	

**New Telstra Customer (Continued)**

**Your Bill**

Your bills will be sent to the email address provided.

**Would you prefer to receive paper bills** (charges may apply for paper bills)?  Yes  No

Address for paper bills (if different from current address listed above) State  Postcode

**Identification**

You must provide 100 points of identification as part of this application. This can be made up of one form of Primary Identification and one form of Secondary Identification. If you do not have acceptable Secondary ID, you can provide a second form of Primary ID or an additional form of Secondary ID. This is a legal requirement and must be provided for every change of ownership or transfer of lease request.

**Primary ID**

(eg. Australian Passport, Australian Drivers Licence, Valid Police/Defence Force ID. Valid Shooters/Firearms Licence)

Type	State of Issue	Number

**Secondary ID**

(e.g. Medicare Card, Birth Certificate, Valid working with Children Card)

Type	State of Issue	Number

Type	State of Issue	Number

For more information on what ID you can provide to Telstra, including a comprehensive list of acceptable primary ID, Secondary ID and their point values, please visit [telstra.com](http://telstra.com) and search 'Acceptable Identification' or call Telstra on 13 2200.

**Directory Listing and Caller Identification Options**

**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.

**Choose your Directory Listing option**

- List my details (\$0) – Your details will be published in the printed and online White Pages® and available via Directory Assistance.
- Do not list my details (\$0) – 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.
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- And, whose life may be at risk without access to a fully operational standard telephone service.

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- Fill in the details of the service number that requires the Priority Assist access below before you submit this Change of Ownership form.
- 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](http://telstra.com) and searching 'Priority Assist'
  - Contacting Telstra on 132200
  - Going into a Telstra store.

Priority Assist covers one home phone line per premises, 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.

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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 processing the Change of Ownership request, please call Telstra on 132200 so we can ensure you have an alternative working service.

### *Incoming Customer Agreement*

#### **Terms and Conditions**

Please ensure you read and understand all Terms and Conditions before signing.

#### **I agree/understand that:**

- I have reviewed and agree to the conditions set out in the Critical information Summary relevant to the services listed in this transfer, including, where applicable, the Telstra StayConnected Critical Information Statement
- 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 you wish to have the services transferred without an associated contract, you will need to ask the Outgoing customer to cancel their contract prior to this Change of Ownership being submitted.
- Where this transfer includes a Mobile device, this device should be handed over to me, by the outgoing customer, at the time the contract is transferred.
- The services listed above will be transferred along with any additional products attached to those services.
- The service will not be listed in the White Pages after transfer. Incoming Customer may choose to change this and can discuss this with Telstra before the transfer is completed.
- BigPond Mailboxes or Telstra Mail services transferred to myaccount without an active internet connection, may be charged an ongoing subscription fee.
- If this Transfer includes a StayConnected service, I understand that if the Outgoing Customer has used both of their exchange/ replacement rights for the current 12 month period (including Screen Repair in the case of StayConnected Advanced™ Customers, I may not be able to exchange or replace your device (or perform a screen repair on your device in the case of StayConnected Advanced™ customers until the next anniversary of the StayConnected subscription. Similarly, if the Outgoing Customer 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;
  - to the terms and conditions of Telstra's Our Customer Terms located at [telstra.com.au/customerterms/index.htm](http://telstra.com.au/customerterms/index.htm) for the services being transferred to me and acknowledge either receiving, or having had the opportunity to review, a copy of Our Customer Terms;
  - to fulfil all obligations imposed upon the current owner under the existing contract for the services;
  - I will be liable for all debts incurred on the services listed above from the date of transfer;
  - I agree that I will not seek to recover loss I have suffered or may suffer (either directly or indirectly) as a result of the transfer;
  - that Telstra may, subject to the Privacy Act 1988:
    - a) verify my identifying information (such as my driver's licence or passport) with the document issuer or official record holder; and
    - b) 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
    - c) 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,
- I have read and understand all statements made in this application form.

**As the Legal Lessee or a listed Authorised Representative of the Incoming Customer, I am requesting that the legal responsibility of the services listed above be transferred from the Outgoing Customer, to me, the Incoming Customer.**

**Name**

**Signature**

**Date**