

# Withdrawal Request Form

## Investment Bonds

Please **PRINT** clearly in **BLACK** or **BLUE** pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

### 1. Investor Details

Policy number

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode     Country

Email

Mobile

### 2. Investment Details

Withdraw funds: based on default investment options

### 3. Type of Withdrawal

Full Withdrawal (interim bonus rate will apply to the Capital Guaranteed Fund for full withdrawals)

To view your investment interim rate please visit [australianunity.com.au/investment-bonds-performance](http://australianunity.com.au/investment-bonds-performance)

Partial Withdrawal (Minimum Amount \$500)

Total Deposit Amount \$

### 4. Investment Option Withdrawal Details (see PDS for option details)

Please withdraw funds as per my current asset allocation/s  If yes, go to step 5.

Please withdraw funds from specific investment option/s  If yes, please complete details below.

<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%

If as a result of your withdrawal you are closing an investment option, you will also need to complete Step 5, to confirm your new asset allocation.

## 5. New asset allocation details

Only complete this section if you're closing an investment option and need to confirm your new asset allocation.

### Option Code

<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%

## 6. Financial Institution Account Details

Bank Name	<input type="text"/>	Branch	<input type="text"/>
Branch Number (BSB)	<input type="text"/>	Account Number	<input type="text"/>
Account name	<input type="text"/>		

### Important information about your withdrawal:

We care about keeping your account safe so there are circumstances where we will need to contact you and verify your details before releasing your payment. These circumstances may include:

- The bank account you've nominated is different to the bank account recorded on your file
- Your signature doesn't match the signature recorded on your file
- We need to verify other details relating to your request.

## 7. To better help us understand our investor's needs, please indicate reason for withdrawal below

Purchase property
  Purchase car
  Purchase other
  Pay off debt
  Invest elsewhere

Other (please specify)

## 8. Declaration and Signature(s)

In consideration of payment of the part of my investment(s) specified in this request, I confirm that I waive all rights to further claims of the benefit of the part(s) of the Investments I am withdrawing.

### Investor 1 signature

Name of Investor 1

  


Date  /  /

### Investor 2 signature

Name of Investor 2

  


Date  /  /

**Note: If under 16 years of age – both parents or guardians to sign and identification is required.**



## Return by email

[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)



## Post

(together with any identification documents where relevant)

**Australian Unity - Investment Bonds, Reply Paid 93753 Melbourne VIC 8060**  
(no stamp required if mailed in Australia)

If posting from outside of Australia, please send to:  
**GPO BOX 4397 Melbourne VIC 3001**

### Contact us



Australian Unity  
GPO BOX 4397 Melbourne VIC 3001



[australianunity.com.au/wealth](http://australianunity.com.au/wealth)

### Investor Services



[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)



1300 1300 38

### Adviser Services



[investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au)



1300 133 285