

Switch Request Form



FlexiGrowth Investment

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 Date of birth //

Title Mr Mrs Ms Miss

Name in full

Residential address (not a PO Box)

Suburb State Postcode

Country (if not Australia)

Phone Mobile

Email

2. Alteration Request

Investment Options

	Existing Details (% or \$)	New Details (% or \$)
Capital Guaranteed Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
Income Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
Cash Enhanced Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
High Yield Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
TOTAL	\$ <input type="text"/> <input type="text"/> <input type="text"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <input type="text"/> <input type="text"/> <input type="text"/> %

Total % must equal 100%.

3. Notes

- The minimum switch is \$500 per Investment Option.
- A maximum of 12 switches are permitted in any rolling 12 month period commencing on your start date.
- Switches from the High Yield Option require 25 business days notice.

4. Declaration and Signature(s)

- I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained this for future reference.
- I understand, from date of acceptance of this form by Lifeplan, my investment funds will be switched as per my instructions provided.

Investor 1 signature

Name of Investor 1

Date //

Investor 2 signature

Name of Investor 2

Date //



Return by email

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


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