

IOOF WealthBuilder

Switching Instruction Form

Complete this form if you wish to switch your investments from one IOOF WealthBuilder Fund to another.

For assistance please contact Investor Services on 1800 002 217

Important information:

- Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** (except for your email address) and **X** boxes where provided.
- The minimum switch amount is \$500 applicable to each IOOF WealthBuilder Fund. You must maintain a minimum balance of \$500 in each Fund
- If this instruction is being made through a nominated representative or under a Power of Attorney, please complete **PART A** or **PART B** (as applicable) as well as the '**Nominated representative or Power of Attorney**' section on page 2.

Step 1: Investor details					
IOOF WealthBuilder account number					
Complete either PART A or PART B depending on your investor type.					
Part A – Individual or joint investors					
Investor 1					
Title	Dr Mr Mrs Ms Miss	Surname			
Given name(s)					
Residential address					
Suburb		State Postcode			
Date of birth	DD/MM/YYYY				
Investor 2 (if applicable)					
Title	X Dr X Mr X Mrs X Ms X Miss	Surname			
Given name(s)					
Date of birth	DD/MM/YYYY				
Investor 3 (if applicable)					
Title	X Dr X Mr X Mrs X Ms X Miss	Surname			
Given name(s)					
Date of birth	DD/MM/YYYY				



Part B - Non-individ or government entit	ual Investors such as companies, trusts, partnerships, associations, registered co-operatives es								
Name of company/									
entity Name of trust	me of trust								
(if applicable)									
Name of contact pers	on or identified trustee ¹								
Title	X Dr X Mrs X Ms X Miss Surname								
Given name(s)									
Mailing address									
Suburb	State Postcode Postcode								
Date of birth	DD/MM/YYYY								
Nominated represent	ative or Power of Attorney ²								
To be completed if a n	ominated representative or Power of Attorney is acting on behalf of the current policy owner(s).								
Title	X Dr X Mr X Mrs X Ms X Miss Surname								
Given name(s)									
Attorney document as Laundering and Counter for a list of documents	ey has not previously been registered by AULBL, we will require a certified copy of the Power of well as the appropriate proof of identification documents in accordance with the <i>Anti-Money er-Terrorism Financing Act 2006</i> (AML/CTF Act). Please refer to the 'Completing Proof of Identity'. This document can be obtained by calling Investor Services on 1800 002 217 or can be downloaded au/aulbl-wealthbuilder								
Step 2: Financial a	dviser details (if applicable)								
Dealer group									
License name									
Financial adviser name									
Financial adviser number	AFS licence number								
Dealer stamp									

For assistance, financial advisers can contact Investor Services on 1800 002 217.

^{1.} As previously nominated for the IOOF WealthBuilder account listed in Step 1.

^{2.} As previously nominated in writing and accepted by AULBL as authority to act on the IOOF WealthBuilder account.



Step 3: Switching instruction

Please indicate which Fund(s) you wish to switch out of and into which Fund(s) you wish your money to be invested:

IOOF WealthBuilder Fund	Switch from my existing Fund(s) (\$ or %) (min. \$500 per fund)				Switch to the following Fund(s) (\$ or %) (min. \$500 per fund)						Regular Savings Plan change (if applicable) (min. \$100 per Fund)					
Diversified											Mon	thly	am	oun	ıt (\$)
Conservative – MLC MultiActive																
Moderate – MLC MultiActive																
Balanced – MLC MultiActive																
Growth – MLC MultiActive																
Cash and income	Monthly amount (\$))								
Cash Management – MLC																
Income – Janus Henderson																
Property Monthly amount (\$))								
International Property Index – Vanguard																
Australian shares											Mon	thly	am	oun	ıt (\$)
Australian Shares Emerging Leaders – Ausbil																
Australian Shares Geared – Colonial First State																
Australian Shares Core – Fidelity																
Australian Shares Long Short – Perpetual																
Australian Shares Index – Vanguard																
International shares											Mon	thly	am	oun	ı t (\$)
International Shares – Magellan															Г	
International Shares – Platinum																
International Shares Hedged – Walter Scott																
International Shares Index - Vanguard																
Other (please specify Fund name	e)										Mon	thly	am	oun	ı t (\$)
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Total																

Must add up to 100%



Important note:

- Complete the Regular Savings Plan column if you wish to change your Regular Savings Plan to include/exclude Funds as a result of this switch request. If the value in any Fund is zero as a result of the switch, you MUST complete this section.
- · Minimum monthly investment is \$100 per Fund.
- · Contributions net of any applicable fees will be invested in your nominated IOOF WealthBuilder Fund(s).
- If your financial institution account details have changed, you will need to complete and return the Direct Debit Request Form. This form can be obtained by contacting Investor Services on 1800 002 217 or by australianunity.com.au/aulbl-wealthbuilder

Step 4: Investor declaration

I/we wish to switch investments between the IOOF WealthBuilder Funds (the Funds) as nominated in this Switching Instruction Form.

I/we declare that:

- all details in this Switching Instruction Form are true and correct and I/we undertake to inform AULBL of any changes to the information supplied as and when they occur
- · any previously agreed adviser remuneration instructions will continue to apply to my account in respect of any Fund changes
- I/we have read the applicable IOOF WealthBuilder Product Disclosure Statement (PDS) (and any Supplementary Product Disclosure Statement (SPDS)) in full and agree to the fees and costs applicable in respect of any new Funds included in my account as a result of this switch instruction.

Privacy

I/We understand, that:

- AULBL is required to collect my/our personal information under the Corporations Act 2001 and the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF Act)
- information provided to AULBL is primarily used for the purpose of operating my/our investment account and for other related purposes as detailed in the PDS (and any SPDS) and AULBL Privacy Policy available at australianunity.com.au/AULBL/privacy
- · AULBL may disclose my/our personal information to internal and external parties as described in the PDS (and any SPDS)
- if I/we do not provide all of the information requested in this application form, AULBL may not be able to action my/our request
- the AULBL Privacy Policy contains information about how I/we may access or correct the personal information held by AULBL and how I/we may complain about a breach of the Australian Privacy Principles.

Who needs to sign?

All original investors registered on the account must sign this section unless previous authority has been provided in writing and accepted by AULBL, such that:

- · a single joint investor can sign on behalf of a joint investor account
- a representative nominated to act and operate on the account can sign on your behalf³
- a Power of Attorney can sign on your behalf³ in which case a certified copy of the Power of Attorney must have been previously provided to AULBL and retained on file for us to process your switch.

Power of Attorney

If signed under a Power of Attorney, the attorney certifies that they have not received notice of revocation of that power.

If the Power of Attorney has not previously been registered with AULBL, please attach a certified copy of the Power of Attorney and the required proof of identification documents in accordance with AML/CTF legislation. For further information, please refer to the 'Completing Proof of Identity' on our website at australianunity.com.au/aulbl-wealthbuilder or alternatively call Investor Services on 1800 002 217.

Corporate investors

This Switching Instruction Form must be signed either:

- · under common seal
- by the representative previously nominated for your IOOF WealthBuilder account
- · by two directors or a director and company secretary
- by the sole director (where applicable).
- 3. If signed by a nominated representative or Power of Attorney, please ensure that the 'Nominated representative or Power of Attorney' section in Step 1 is completed.



If not signing under common seal, please state your title, such as Director, Company Secretary or Sole Director and Company Secretary.

Investor/signatory 1	Investor/signatory 2 (for joint investor or additional trustees, if applicable)
Surname	Surname
Given name(s)	Given name(s)
Title (if applicable)	Title (if applicable)
Title (II applicable)	Title (II applicable)
Signature	Signature
X	X
Date DD/MM/YYYY	Date D D / M M / Y Y Y
Investor/signatory 3 (for joint investor or additional trustees, if applicable)	Investor/signatory 4 (for additional trustees, if applicable)
Surname	Surname
Given name(s)	Given name(s)
Title (if applicable)	Title (if applicable)
Title (II applicable)	Title (II applicable)
Signature	Signature
X	X
Date DD/MM/YYYY	Date DD/MM/YYYYY
Common seal (if required)	

Important information:

- · An investment made in IOOF WealthBuilder does not represent an investment in Australian Unity Life Bonds Limited (AULBL), ABN 21 087 649 625, AFS Licence No. 230522, nor any related body corporate within the Australian Unity group, nor any investment management company appointed to manage the investment assets of the IOOF WealthBuilder Funds (the Funds).
- Neither AULBL nor any related body corporate within the Australian Unity group, nor any investment management company appointed to manage the investment assets of the Funds, guarantees the performance of any Fund or the return or repayment of capital or income (except the Capital Guaranteed Fund where the return of capital is guaranteed).
- · Investments in IOOF WealthBuilder are subject to investment risks including possible delays in repayment and loss of income and principal invested.





Post to:

IOOF WealthBuilder, Reply Paid 264, Melbourne VIC 8060



Facsmile:

1800 558 539



Enquiries: 1800 002 217



Email:

investors er vices @insignia financial.com. au