

## FuneralPlan Bond/Pre-paid

### Announcement – 7 April 2014

The purpose of this announcement is to note:

- the change to the exempt funeral investments threshold;
- the change to the asset allocation benchmark; and
- update what investments the FuneralPlan Bond/Pre-paid may hold.

#### Changes to the exempt funeral investments threshold

On 1 July 2013, the exempt funeral investment threshold increased from \$11,500 to \$11,750. This threshold is indexed on 1 July each year. <sup>(1)</sup>

#### Changes to the Tax Minimiser Funeral Bond Fund asset allocation benchmark

On 16 September 2013, the asset allocation benchmark has changed as follows:

Asset allocation	Benchmark	Range
Cash	20%	15 – 100%
Fixed interest	80%	0 – 85%

#### Update to the investments that may be held by the Tax Minimiser Funeral Bond Fund

The governing rules of the Tax Minimiser Funeral Bond Fund provide Lifeplan with wide discretion about what investments may be held by the Fund. You should note that this encompasses the ability to use financial derivative instruments.

Please note that the FuneralPlan Bond and FuneralPlan Pre-Paid are issued out of the Tax Minimiser Funeral Bond Fund.

(1) Source: Department of Human Services

#### Important Information

This information is not based upon the financial objectives, situation or needs of any particular investor. This Product is issued by Lifeplan Australia Friendly Society Limited ABN 78 087 649 492 AFSL 237989.

**Address** 111 Gawler Place, Adelaide SA 5000

**Telephone** 1300 1300 38

**Facsimile** 1800 804 890

**Email** [enquiries@lifeplan.com.au](mailto:enquiries@lifeplan.com.au)