

# Direct Debit Form

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

Fund name	<input type="text"/>														
Member number	<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"/>	<input type="text"/>	<input type="text"/>			
Title	<input checked="" type="checkbox"/> Mr	<input checked="" type="checkbox"/> Mrs	<input checked="" type="checkbox"/> Ms	<input checked="" type="checkbox"/> Miss	Date of birth	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name in full	<input type="text"/>														
Residential address (not a PO Box)	<input type="text"/>														
Suburb	<input type="text"/>										State	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Country	<input type="text"/>									
Phone	<input type="text"/>						Mobile	<input type="text"/>							
Email	<input type="text"/>														

## 2. Financial Institution Account Details

I/we authorise Lifeplan (user ID: 026445) to debit this amount annually from my/our specified account as follows  
(NB: customers that are in an indexed fund, the contributions will index by CPI end of year):

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

from the account specified annually, commencing from next premium due date

## 3. Declaration and Signature(s)

I have read and understood the Direct Debit Request (DDR) Service Agreement.

### Account Holder Signature

<input checked="" type="checkbox"/>
Name of Account Holder
<input type="text"/>
<input type="text"/>
Date

### Joint Account Holder Signature

<input checked="" type="checkbox"/>
Name of Joint Account Holder
<input type="text"/>
<input type="text"/>
Date



### 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](https://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

## Direct Debit form service agreement

### Our commitment to you

This document sets out your rights, our commitment to you and your responsibilities to us together with where you should go for assistance in respect of your direct debit arrangement with Australian Unity.

### Initial terms of the arrangement

In terms of the DDR arrangement made between us and signed by you, we undertake to periodically debit your nominated account in accordance with your signed authority to direct debit.

### Drawing arrangements

If any drawing falls due on a non-business day, it will be debited from your account on the next business day following the scheduled drawing date. We will give you at least 14 days written notice when we intend to make changes to the initial terms of the arrangement.

We reserve the right to cancel the Direct Debit drawing arrangements if three (3) or more drawings are returned unpaid by your nominated financial institution.

### Your rights

#### Changes to the arrangement

If you want to make changes to the drawing arrangements, please notify us in writing at least 4 business days prior to your next scheduled drawing date. These changes may include:

- Deferring the drawing
- Altering the schedule
- Stopping an individual debit
- Suspending the DDR
- Cancelling the DDR completely

### Enquiries

If you have any enquiries they should be directed to Australian Unity, rather than to your financial institution.

All personal customer information held by us will remain confidential except for information that may be provided to our financial institution to initiate the drawing to your nominated account or information may be disclosed to a third party as required by law. Information may also be provided to Australian Unity Limited or any of its wholly owned subsidiaries to enable the DDR to be effected as required by law.

### Disputes

If you believe that a drawing has been initiated incorrectly, you should raise the matter directly with Australian Unity.

If you do not receive a satisfactory response from us, contact your financial institution who will respond to you with an answer to your claim:

- within 7 business days (for claims lodged within 12 months of the disputed drawing) or
- within 30 business days (for claims lodged more than 12 months after the disputed drawing).

You will receive a refund of the drawing amount if we can not substantiate the reason for the drawing.

Note: Your financial institution will ask you to contact us to resolve your disputed drawing prior to involving them.

### Your commitment to us

It is your responsibility to ensure that:

- your nominated account can accept direct debits (your financial institution can confirm this)
- that on the drawing date there is sufficient cleared fund in the nominated account

If your drawing is returned or dishonoured by your financial institution, we will notify you in writing. Any transaction fees payable by us in respect of the above may be passed on to you. Consecutive returns or dishonours may result in the direct debit facility being withdrawn.