

Consent for Fixed-Term Adviser Service Fee Deduction

Adviser Service Fee

By completing this form, you are providing consent to pay adviser service fees to your nominated financial adviser from your account with Lifeplan Australia Friendly Society Limited (LAFS). Please read the form carefully to ensure this accurately reflects the agreement with your adviser. If you have any questions, please feel free to contact your adviser.

Policy number (if known)

Investor / joint investor details

Investor 1

Title ☒ Mr ☒ Mrs ☒ Ms ☒ Miss Date of birth / /

Surname

Given names

Residential address (not a PO Box)

Suburb State Postcode

Country (if not Australia)

Phone Mobile

Email

Investor 2

Title ☒ Mr ☒ Mrs ☒ Ms ☒ Miss Date of birth / /

Surname

Given names

Residential address (not a PO Box)

Suburb State Postcode

Country (if not Australia)

Phone Mobile

Email

Financial adviser details

Adviser full name

Dealer Group AFSL

Office address (not a PO Box)

Suburb State Postcode

Country (if not Australia)

Phone Mobile

Email

Nominated product/policy

You agree that the Fixed Term Adviser Service Fee will be deducted from the account(s) noted below:

Product name / Policy number	Policy owner(s)

Fixed term adviser service fee amount

You agree that the following fee will be deducted from your nominated account(s) and be paid as adviser service fees for a maximum of 12 months:

Dollar (\$)/month	OR	Percentage (%) /per annum
\$		%

Reasonable estimate / %FUA

We estimate you will pay the following ongoing fee(s) from the policy noted below:

Product name / Policy number	Policy owner(s)	Current investment balance	Agreed percentage fee	Estimated fee (inc GST) / month
		\$	%	\$
		\$	%	\$
Total estimate of fees for the next 12 months				\$

Please be aware this is an estimate of fees only based on your current investment balance(s) and an agreed percentage fee as noted in the table to be applied at the time the deduction is processed.

Services provided for fees

Below is an outline of the services your adviser will provide under this fee agreement.

Consent period

This consent starts on / / and ends on / /

The consent end date for this current arrangement cannot be changed. The maximum period the consent can be valid for is 12 months from the fee start date.

Client authorisation

By signing below, you give consent to both of:

- (i) the deduction of one-off fees, as outlined in this notice; and
- (ii) the method of payment of those one-off fees.

Signature 1

X

Name

Date / /

Signature 2

X

Name

Date / /



Return by post

(together with any identification documents where relevant)

Australian Unity – Investment Bonds
Reply Paid 89, Adelaide SA 5001

(No stamp required if mailed within Australia)

If posting from outside Australia, please send to:
271 Spring Street, Melbourne VIC 3000



Email

investmentbonds@australianunity.com.au

Contact us

Adviser Services

1300 133 285

australianunity.com.au/wealth