

# Switch by Instalments Form

## Lifepan Investment Bond

Please **PRINT** clearly in **BLACK** or **BLUE** pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

Please read the following instructions before completing this form:

- Complete this form only if you want a switch transaction processed in instalments.
- Partial switch transactions will be based on the dollar (\$) amount specified. If the final instalment is less than the proposed amount, the balance will be transferred.
- During the final instalment of a Partial Switch transaction, if the remaining balance exceeds the specified switch amount, only the specified amount will be transferred.
- If Australian Unity receives this request after the indicated commencement date or if no commencement date is specified, the switch will commence on the next available business day.
- We may process switches later than the requested date, particularly if the requested date falls on a non-business day or if there are pending switches in progress.
- Subsequent switches will occur on the same day or the next business day.
- Please refer to the Product Disclosure Statement (PDS) available at [australianunity.com.au/wealth](http://australianunity.com.au/wealth) for information on investing transaction costs and up to date investment options information.

### 1. Investor details

Title	<input checked="" type="checkbox"/> Mr	<input checked="" type="checkbox"/> Mr	<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"/>
Full name	<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"/>	<input type="text"/>
Country (if not Australia)	<input type="text"/>														
Phone	<input type="text"/>					Mobile	<input type="text"/>								
Email	<input type="text"/>														

### 2. Switch Type

Plan number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Switch Commencement Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Please specify switch type.

Full Switch (Note: For full switches, an amount in Section 6 is not required.)  Partial Switch

**Note:** A full switch will transfer the entire balance of the selected investment over the specified number of instalments.

### 3. Frequency

How frequently would you like to switch your investment?

Weekly  Fortnightly  Monthly  Quarterly

### 4. Number of Instalment

Please provide the number of instalments for your switch

### 5. Investment Option

The specified amount will be transferred during each installment.

**Note:** Amount is not required when Full Switch has been selected.

**From Option Code**


**To Option Code**


**Amount**

\$									
\$									
\$									
\$									
\$									

For a list of investment options, visit [australianunity.com.au/wealth/forms](http://australianunity.com.au/wealth/forms)

### 6. Declaration and Signature

I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained for future reference.

**Investor 1 signature**

X
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**Investor 2 signature**

X
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Name of Investor 1

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Name of Investor 2

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Date 

D	D
---	---

 / 

M	M
---	---

 / 

Y	Y	Y	Y
---	---	---	---

Date 

D	D
---	---

 / 

M	M
---	---

 / 

Y	Y	Y	Y
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**Return by post**

Send completed form together with relevant identification documents.

**Within Australia**

Australian Unity - Investment Bonds  
Replied Paid 93753  
MELBOURNE VIC 8060  
(No stamp required if mailed within Australia)

**Outside Australia**

GPO Box 4397  
MELBOURNE VIC 3001



**Email**

[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)

**Contact us**

**Investor Services**  
**1300 130 038**  
**[australianunity.com.au/wealth](http://australianunity.com.au/wealth)**