

Consent for Ongoing Adviser Service Fees

Adviser Service Fee

Name of practice

is required by law to obtain your written consent before the ongoing fees can be deducted from your account with Lifeplan Australia Friendly Society Limited (LAFS). By completing this form, you are providing consent to pay ongoing adviser service fees to your nominated financial adviser. 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.

Please note: Your consent will cease to have effect up to 150 days after the anniversary date and you can withdraw your consent, terminate or vary this ongoing fee arrangement at any time by writing to your adviser. If you do not provide written consent to deduct ongoing fees, we are legally obliged to cease the fees that you pay.

Policy number
(if known)

Investor / joint investor details

Investor 1

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"/> <input type="text"/> <input type="text"/>
Surname	<input type="text"/>					
Given names	<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"/>
Country (if not Australia)	<input type="text"/>					
Phone	<input type="text"/>		Mobile	<input type="text"/>		
Email	<input type="text"/>					

Investor 2

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"/> <input type="text"/> <input type="text"/>
Surname	<input type="text"/>					
Given names	<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"/>
Country (if not Australia)	<input type="text"/>					
Phone	<input type="text"/>		Mobile	<input type="text"/>		
Email	<input type="text"/>					

Financial adviser details

Adviser full name	<input type="text"/>				
Dealer Group	<input type="text"/>	AFSL	<input type="text"/>	<input type="text"/>	<input type="text"/>
Office address (not a PO Box)	<input type="text"/>				
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>
Country (if not Australia)	<input type="text"/>				
Phone	<input type="text"/>	Mobile	<input type="text"/>		
Email	<input type="text"/>				

Adviser service type

☒ New ongoing fee arrangement ☒ Change in adviser fee arrangements ☒ Renewal

How long does your consent last?

From // to // you agree to pay the fees outlined in the section below.

Your consent expires on // which is 1 year plus 150 days after your anniversary date.

What amount of ongoing fees will you pay?

Exact / Flat Fees

You will pay the following ongoing fee(s) from the account noted below:

Product name / Policy number	Policy owner(s)	Fee amount (inc GST) / month
		\$
		\$
Total fees for the next 12 months		\$

Reasonable estimate / %FUA

We estimate you will pay the following ongoing fee(s) from the account 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.

What happens if we don't receive your consent?

Without receipt of the subsequent written consent to deduct ongoing fees prior to the consent expiring, our ongoing service agreement terminates. This means that your adviser will have to ask for you to sign a new ongoing service agreement if we are to recommence deducting ongoing fees from your account in return for ongoing services.

How can you withdraw your consent?

You may vary or withdraw your consent at any time by notifying your adviser in writing at the contact details on page 1 of this form.

Client authorisation

By signing below, you give consent to both of:

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

Signature 1

X

Name

Date / /

Signature 2

X

Name

Date / /



Return by email

investmentbonds@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 within Australia)

If posting from outside Australia, please send to:
GPO Box 4397 Melbourne VIC 3001

Contact us

Adviser Services

1300 133 285

australianunity.com.au/wealth