

# Direct Debit Authority Form

## Lifepan Education Savings Plan

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

This form is only to be used when **adding** funds to an investment. If a withdrawal is required please call our enquiries number on **1300 1300 38**.

### 1. Investor Details

#### Plan Sponsor 1

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Plan Sponsor 1 Surname

Plan Sponsor 1 Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

Phone  Mobile

Company/Trust/Other

#### Student Beneficiary

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Student Beneficiary Surname

Student Beneficiary Given name(s)

Residential address (not a PO Box)

Suburb  State

Postcode     Country

Phone  Mobile

Company/Trust/Other

### 2. Plan Details

Plan number

### 3. Fixed Amount Request

Please indicate if this request is to:  Initiate  Change Account Details  Change Amount  Cancel

I/We request that Lifepan Australia Friendly Society User ID 026445 draw by the way of the Direct Debit System, the amount of:

\$

Commencing on   /   /

#### 4. Frequency

Please select your direct debit frequency:  Monthly (this will occur on the 15th day of each month)  Weekly  Fortnightly  Every 4 weeks  
 Once only

Deduction date   /   /

Please allow a minimum of 3 business days for commencement.

#### 5. Financial Institution Account Details

Bank Name  Branch   
 Branch Number (BSB)       Account Number            
 Account name

#### 6. Declaration and Signature(s)

I/We acknowledge that this Direct Debit arrangement is governed by the terms of the Lifeplan Direct Debit Client Agreement as set out on the next page of this request form.

##### Plan Sponsor 1 signature

Name of Plan Sponsor 1

Date   /   /

##### Plan Sponsor 2 signature

Name of Plan Sponsor 2

Date   /   /

Please sign below if account holders are different to the Plan Sponsors (if joint account all signatories are required).

##### Account owner 1 signature

Name of account owner 1

Date   /   /

##### Account owner 2 signature

Name of account owner 2

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](http://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 – Client Service Agreement

By completing and signing the Direct Debit Request Authorisation included in the application form, you authorise us to draw on your nominated account with the following understanding:

- We will advise you, in writing of any change to this direct debit client service agreement at least 14 calendar days prior to the date of any such change.
- Were the due date of the debit to be made falls on a non business day, we will draw the amount on the next business day.
- We will not change the amount of frequency of drawing arrangements without your prior approval.
- If you are making a once only lump sum payment, we will deduct this amount only once from your account nominated on the direct debit form. We require 3 business days notice. No further deductions will take place under this direct debit client service agreement.
- We reserve the right to cancel the direct debit arrangements if 3 of more drawings are returned unpaid by your nominated financial institution and to arrange with you an alternate payment method. We may, at our discretion, pass onto you any costs we incur due to any direct debit refusal by deducting the cost from your investment.
- We will resolve any dispute of a direct debit drawing within 7 business days and in the course of resolution we may share information with our direct debit sponsor.

### Your rights

- You may terminate the direct debit arrangements at any time by giving written notice to us. Such notice should be received by us at least 3 business days prior to the due date.
- You may stop payment of a direct debit under the agreed arrangements by giving us written notice. Such notice should be received by us at least 3 business days prior to the due date.
- You may change the direct debit amount by advising us in writing of your requirements no less than 3 business days prior to the due date.
- You may dispute a direct debit drawing by advising us in writing of the full details of the transaction. You must include the account numbers of both the account to be debited and credited, the amount, date, nature and circumstances of the disputed transaction. We will investigate your claim and in the event of a debit being transacted incorrectly, a full refund will be provided within 7 days.

### Your commitment to us

- It is your responsibility to ensure that the nominated account can accept direct debits and that sufficient cleared funds are available in the nominated account to meet a drawing on its due date.
- It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the financial institution where the account is based.
- It is your responsibility to advise us in writing if the account nominated by you to be debited is transferred or closed.
- It is your responsibility to arrange with us a suitable alternate payment method if the direct debit arrangements are cancelled either by yourselves or the nominated financial institution.
- It is your responsibility to contact us directly for any query or dispute in relation to any direct debit transactions. Please direct all telephone enquiries to 1300 1300 38.
- It is your responsibility to meet any changes you may incur from your use of the direct debit system.