

Switch Request Form



FlexiGrowth Investment

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

Policy number Date of birth / /

Title Mr Mrs Ms Miss

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

2. Alteration Request

Investment Options

	Existing Details (% or \$)		New Details (% or \$)
Capital Guaranteed Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <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"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
Income Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <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"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
Cash Enhanced Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <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"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
High Yield Option	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <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"/> or <input type="text"/> <input type="text"/> <input type="text"/> %
Total	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> or <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"/> or <input type="text"/> <input type="text"/> <input type="text"/> %

Total % must equal 100%.

3. Notes

- The minimum switch is \$500 per Investment Option.
- A maximum of 12 switches are permitted in any rolling 12 month period commencing on your start date.
- Switches from the High Yield Option require 25 business days notice.

4. Declaration and Signature(s)

- I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained this for future reference.
- I understand, from date of acceptance of this form by Lifeplan, my investment funds will be switched as per my instructions provided.

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 2

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 in Australia)

If posting from outside of Australia, please send to:

Head Office: 114 Albert Road, South Melbourne VIC 3205



Fax


1800 804 890




Email


enquiries@australianunity.com.au


Contact us


 Australian Unity
114 Albert Road, South Melbourne VIC 3205

 australianunity.com.au/wealth


Investor Services


 enquiries@australianunity.com.au


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Adviser Services

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