

## Announcement

### FuneralPlan Bond – New Product Disclosure Statement

**30 June 2023**

A new Product Disclosure Statement (PDS) has been issued for FuneralPlan Bond and FuneralPlan with Pre-Paid, effective 30 June 2023.

The FuneralPlan Bond & FuneralPlan Pre-Paid PDS was primarily updated for:

- ceasing offering of Travel Protection insurance
- consolidation of the FuneralPlan Bond and FuneralPlan Pre-paid PDSs into one combined PDS
- updates to the Fees and Costs section
- updates to the relevant thresholds for the 2022-2023 financial year

Below is a summary of changes made to the FuneralPlan Bond PDS:

#### **Removal of Travel Protection insurance**

The offering of Travel Protection insurance to new customers has been ceased effective 30 June 2023. For more information, please refer to the [FuneralPlan Bond PDS](#).

#### **Consolidation of the FuneralPlan Bond and FuneralPlan Pre-Paid PDS**

The FuneralPlan Bond and FuneralPlan Pre-Paid PDS' have been combined into the one, simple PDS. Please refer to the new [PDS](#) for combined changes.

#### **Fees and other costs**

The Fees and other costs and Additional explanation of fees and costs sections in the FuneralPlan PDS have been updated to help you compare fees and costs of products.

#### **Update of the Tax thresholds for 2022-2023 financial year**

For the 2022-2023 financial year, the threshold for contribution limits is \$14,000. This threshold is generally indexed to the CPI on 1 July each year. For more information, please refer to the [FuneralPlan Bond PDS](#) or alternatively visit the [Services Australia website](#) for any updates.

#### **Transition period**

We will accept new applications on the previous FuneralPlan Application form for a maximum of 30 days after 30 June 2023. This transition period will expire on 30 July 2023. Any application sent to us after 30 July 2023 must be completed on the application form in the new PDS. The transition period does not apply to the Travel Protection Plan.

#### **Further information**

If you have any questions, please contact the Investor Services team on 1300 1300 38 or email [enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au), or the Adviser Services team on 1300 133 285 or email [investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au).

Visit our website [australianunity.com.au/wealth](https://australianunity.com.au/wealth) for further information or refer to the FuneralPlan PDS.