

10 October 2023

Notification to temporarily suspend contributions and redemptions in Lifeplan TaxSmart Australian Share option.

Lifeplan Australia Friendly Society Limited (*Lifeplan*), as issuer of the Lifeplan TaxSmart Investments policy (*TaxSmart*) advises its underlying investment in the Platypus Systematic Growth Fund (*Fund*) via the TaxSmart Australian Share option is being terminated.

Australian Unity Funds Management Limited (AUFM), the Responsible Entity of the Fund, has determined to terminate the Fund. Effective immediately, AUFM is not accepting applications or redemptions for the Fund.

Consequently, as the Fund forms a material part of the Wealth Builder's Australian Share option, Lifeplan will also temporarily stop accepting contributions, regular savings plans, switches and redemptions for the Wealth Builder Australian Share option until **both** –

- AUFM has returned all capital from the orderly termination of the Fund; and
- Lifeplan has selected an appropriate replacement investment for the Australian Share option within TaxSmart.

Presently, AUFM has not communicated a date by which all capital will be returned.

Lifeplan will cancel any pending contributions, redemptions or switches made in TaxSmart.

What happens next

No action from you is required. Lifeplan will communicate again once we have received an update from AUFM. At which time, we will provide you with an update as to when the temporary suspension to contributions and redemptions will end.

We appreciate your support and apologise for any inconvenience caused by the temporary suspension of TaxSmart.

Further information

If you have any queries, please contact your tax or financial adviser. Alternatively, you can call our Investor Services team on 1300 1300 38, or email enquiries@australianunity.com.au.

Important information

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