

# IOOF ESTATE ESSENTIALS

## Additional Investment Form

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** (except for your email address) and **X** boxes where provided.

Please complete this form if you wish to make an additional investment to your existing IOOF Estate Essentials Bond.

### Investor details

Investor number

Account number

Investor 1 name

Investor 2 name                       
(for joint investors only)

### Additional investment amount

I/We wish to make an additional investment amount\* of \$         to my/our account listed above.

\*Minimum additional investment is \$500

**Please Note:** The maximum investment limit for your IOOF Estate Essentials Bond is currently \$15,500 so you should take into account any previous investments made to your IOOF Estate Essential Bond to ensure you do not exceed the maximum.

### Declaration

By signing below, I/we acknowledge that my/our additional investment will form part of the IOOF Funeral Benefit Fund and I/we agree to be bound by Benefit Fund Rule 7.14 which contains the terms and conditions upon which the benefit is issued.

**Investor 1 signature**

X

Date

  /   /    

**Investor 2 signature** (for joint investors only)

X

Date

  /   /    

Please make your cheque payable to **'IOOF Applications Trust Account – [Applicant(s) Name(s)]'** marked **'Not Negotiable'** and attach it to this form before mailing to: **IOOF Estate Essentials Bond, Reply Paid 264, Melbourne VIC 8060**

### Important Information


- Your investment in the IOOF Estate Essentials Bond does not represent an investment in AULBL, nor any related or associated entity within the Insignia Financial Group. Neither AULBL or any related or associated entity within the Australian Unity guarantees the performance of the IOOF Funeral Benefit Fund.
- The benefits of your IOOF Estate Essentials Bond cannot be accessed or surrendered prior to policy maturity (which is the date of death of the life insured). Proceeds must be solely used to meet the funeral expenses of the life insured.

**For further information on IOOF Estate Essentials, please contact our Investor Services team on 1800 002 217 or email [investorservices@insigniafinancial.com.au](mailto:investorservices@insigniafinancial.com.au)**

 **Post to:**  
IOOF WealthBuilder, Reply Paid 264, Melbourne VIC 8060

 **Facsimile:**  
1800 558 539

 **Enquiries:**  
1800 002 217

 **Email:**  
[investorservices@insigniafinancial.com.au](mailto:investorservices@insigniafinancial.com.au)