

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	<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
Account number/ Portfolio ID	<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
Investor 1 name	<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"/>	<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"/>	<input type="text"/>	<input type="text"/>
Investor 2 name (for joint investors only)	<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"/>	<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"/>	<input type="text"/>	<input type="text"/>

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: Before completing this form, you should take into account any previous investments made to your IOOF Estate Essentials Bond to ensure you do not exceed the Exempt Funeral Investment Threshold (if applicable). For more information, visit the announcements section of our website at australianunity.com.au/wealth or the websites of the Department of Human Services or the Department of Veterans' Affairs.

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

Date

 / /

Investor 2 signature (for joint investors only)

Date

 / /

Additional contributions can be made via BPAY or direct debit. Refer to the guide to making payments for further details.

Important Information

- Your investment in the IOOF Estate Essentials Bond does not represent an investment in LAFS, nor any related or associated entity within the Australian Unity Group. Neither LAFS or any related or associated entity within the Australian Unity Group 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 1300 1300 38 or email bonds@australianunity.com.au



Post to:

**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



Enquiries:

Advisers – 1300 133 285
Investors – 1300 1300 38



Email:

bonds@australianunity.com.au

Guide to making payments

Additional contributions can be made via BPAY or direct debit. Refer to the instructions on how to make payments via BPAY or complete the direct debit request form below.

How to make payments via BPAY

BPAY®¹ provides a secure and convenient way to make payments to your IOOF Estate Essentials account through telephone or internet banking.

To make payments via BPAY, you will need:

- your Customer Reference Number (CRN)
- the applicable Biller Codes.

Your CRN is automatically allocated to you when your Estate Essentials account is established.

- **BPAY is only available to investors with an Australian financial institution account. Please contact your financial institution to arrange BPAY.**
- **Payments via BPAY generally cannot be reversed.**

Step 1

Through your nominated financial institution's telephone or internet banking service, select the BPAY option.

Step 2

Enter the applicable Biller Code for Lifeplan Australia Friendly Society Applications - 472001

Step 3

Enter the CRN for your account and the amount you wish to deposit as an additional contribution to an Estate Essentials Bond.

Step 4

Record the receipt number provided for your transaction. Please keep this for your personal records.

Where do I go for more information?

If you require any further assistance with making payments via BPAY, please contact your financial institution. Alternatively, you can contact our Investor Services team on 1300 1300 38.

1. Registered to BPAY Pty Ltd ABN 69 079 137 518. Only available if your nominated financial institution offers this service.

IOOF Estate Essentials

Direct Debit Request (DDR) Form

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

If this is for an existing IOOF Estate Essentials account, please provide your account number/Portfolio ID.

Account number/Portfolio ID (if known)

Investor number

Step 1: Investor details

Investor 1

Title ☒ Dr ☒ Mr ☒ Mrs ☒ Ms ☒ Miss Surname

Given name(s)

Residential address

Suburb State Postcode

Investor 2 (if applicable)

Title ☒ Dr ☒ Mr ☒ Mrs ☒ Ms ☒ Miss Surname

Given name(s)

Step 2: 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: Before completing this form, you should take into account any previous investments made to your IOOF Estate Essential Bond to ensure you do not exceed the Exempt Funeral Investment Threshold (if applicable). For more information, visit the announcements section of our website at australianunity.com.au/wealth or the websites of the Department of Human Services or the Department of Veterans' Affairs.

Step 3: Financial institution details

Name of financial institution

Branch

Address of branch

Suburb State Postcode

Account name

Branch Number (BSB) Account Number

Please Note:

- Direct debit through the Bulk Electronic Clearing System (BECS) is not available on all accounts. If in doubt, please refer to your bank or financial institution.
- If the financial institution account is held in the name of a third party(ies), the third party(ies) must also sign Step 4 of this form (please see the 'For third party accounts only' section of this DDR form).

I/we, the holder(s) of the above account, authorise and request LAFS (User ID 026 445) to debit my/our account as detailed above with any amount which LAFS may debit or charge through the BECS.

1. As previously nominated for your IOOF Estate Essentials account.

Step 4: Signature(s)

By signing below, I/we:

- declare that all details provided in this DDR form are true and correct and I undertake to inform LAFS of any changes to the information supplied as and when they occur
- have read the Direct Debit Request Service Agreement accompanying this DDR form and agree to be bound by the terms by which this DDR operates
- 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.

Privacy

I/We understand, that:

- LAFS is required to collect my/our personal information under the *Corporations Act 2001* and the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (AML/CTF Act)
- information provided to LAFS is primarily used for the purpose of operating my/our investment account and for other related purposes as detailed in the Key Features Document, PDS, and any SPDS (as applicable) and Australian Unity Privacy Policy available at australianunity.com.au/privacy-policy
- LAFS may disclose my/our personal information to internal and external parties as described in the Key Features Document, PDS, and any SPDS (as applicable)
- if I/we do not provide all of the information requested in this application form, LAFS may not be able to action my/our request
- the Australian Unity Privacy Policy contains information about how I/we may access or correct the personal information held by LAFS and how I/we may complain about a breach of the Australian Privacy Principles.

Investor/signatory 1

Surname

Given name

Title (if applicable)

Signature

Date

Investor/signatory 2 (if applicable)

Surname

Given name

Title (if applicable)

Signature

Date

Power of Attorney

If this form is signed under a Power of Attorney, please enclose a certified copy of the Power of Attorney with this form (unless provided previously). If signed under Power of Attorney, the attorney certifies that they have not received notice of revocation of that power.

For third party accounts only

Important information if a third party account has been listed for the Direct Debit facility.

A third party is a person, entity or company who is not the holder of the IOOF Estate Essentials account that this direct debit arrangement relates to.

If the financial institution account is held in the name of the investor and a third party, or a third party(ies) only, the third party(ies) must also sign below authorising direct debit payments from their account.

Under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (AML/CTF Act), proof of identity is required for all third party account holders. For information on the types of proof of identity documents which can be provided, please refer to the investor identification forms which can be obtained from our website at australianunity.com.au/wealth/forms or by contacting Investor Services on 1300 1300 38.

By signing below, I/we consent to the investor(s) registered on this Estate Essentials account to debit the required contribution(s) from the account listed in this form and understand and agree that the contribution amount may change without further approval from me/us.

Third party 1

Surname

Given name

Title (if applicable)

Signature

Date

Third party 2

Surname

Given name

Title (if applicable)

Signature

Date



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