

Announcement

IOOF Estate Essentials

22 October 2025

This announcement is issued by Lifeplan Australia Friendly Society Limited, ABN 78 087 649 492, AFS Licence No. 237989 ('Lifeplan'), as the issuer of IOOF Estate Essentials.

Updated Exempt Funeral Investment Threshold

We wish to inform you of an update to the exempt funeral investment threshold.

The threshold is generally indexed to the Consumer Price Index (CPI) on 1 July each year. The updated threshold for the 2025-2026 year is **\$15,750**.

Exempt Funeral Investment Threshold:

Financial Year	Limit
2024-2025	\$15,500
2025-2026	\$15,750

For more information about the exempt funeral investment threshold, visit the website of the Department of Human Services or the Department of Veterans Affairs.

Contact Us

If you have any questions, please call the Insignia Financial team on 1800 002 217 or email investorservices@insigniafinancial.com.au.

From Monday 27 October 2025, please call the Investor Services team on 1300 1300 38 between 8.30am and 5.30pm (AEST) weekdays or email us at enquiries@australianunity.com.au, or the Adviser Services team on 1300 133 285 or email investmentbonds@australianunity.com.au.

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