Australian Unity
Real Wellbeing

Announcement

Lifeplan Investment Bond

Suspension of investment options:
Pro-D Balanced Fund, Pro-D Growth Fund and Pro-D High Growth Fund

1 September 2026

This is an important update regarding the Pro-D Balanced Fund, Pro-D Growth Fund and Pro-D High Growth Fund (each a 'Fund' and together, the 'Funds'), which were available as investment options to Lifeplan Investment Bond policyholders.

Lifeplan Australia Friendly Society Limited (ABN 78 087 649 492, AFSL 237989) ('Lifeplan') is the issuer of the Lifeplan Investment Bond. Australian Unity Funds Management Limited (AUFM) ABN 60 071 497 115, AFS Licence No. 234454, is the responsible entity of each Fund.

The investment options available through Lifeplan Investment Bond are as follows:

Option Code	Lifeplan APIR	Underlying APIR	Option Name	Option Status
10131	LIF3074AU	AUS0066AU	Pro-D Balanced	Closed to new investors
10132	LIF6005AU	AUS0068AU	Pro-D Growth	Closed to new investors
10133	LIF9075AU	AUS0064AU	Pro-D High Growth	Closed to new investors

Proposed winding up of the Funds and suspension

AUFM has announced that following a strategic review of the Funds, it intends to take steps to wind up each of the Funds, which is expected to complete in late October 2026 (although this timing may change). Consequently, AUFM has suspended all transactions in respect of each Fund effective from **26 August 2026**.

For more information on the change, please refer to the Continuous Disclosure Notice issued by AUFM at the below links:

- **Pro-D Balanced**
- **Pro-D Growth**
- **Pro-D High Growth**

How will this affect you?

Effective from 26 August 2026, and until further notice, as a consequence of AUFM's announcement and action, Lifeplan has suspended all Lifeplan Investment Bond transactions relating to the Funds, including contributions, regular savings plan, regular withdrawals, switches and full withdrawals. We will communicate further details surrounding the proposed wind up of the Funds as they are received from AUFM.

1. Contributions and regular savings plan

If you have a regular savings plan or make ad-hoc contributions to your account, you should consider nominating another investment option. Investment allocations into the Funds will be re-allocated to the default investment option until new instructions are received. The default investment option is the First Sentier Institutional Cash Fund.

You can view a full list of current investment options available through the Lifeplan Investment Bond on our website.

2. Withdrawals and adviser service fee payments (if applicable)

If you have a regular withdrawal facility and/or make any adviser service fee payments from your account, please consider nominating another investment option from which withdrawals and fee payments can be made. Withdrawals and fee payments cannot be made from any suspended Funds.

3. Investment option switches

Any switch requests relating to the Funds (in part or whole) will not be accepted during this period.

We recommend investors discuss these changes with their financial adviser and consider how they may impact your portfolio.

Further information

If you have any questions, please contact the Investor Services team on **1300 1300 38** or email enquiries@australianunity.com.au, or the Adviser Services team on **1300 133 285** or email **investmentbonds@australianunity.com.au**

Important information

Lifeplan Investment Bond is issued by Lifeplan Australia Friendly Society Limited ABN 78 087 649 492 AFS Licence No. 237989 ('Lifeplan'), a wholly owned subsidiary of Australian Unity Limited ABN 23 087 648 888. This information is general in nature and does not take into account your objectives, financial situation or needs. Before making any investment decision, you should consider the appropriateness of the information and read the applicable Product Disclosure Statement (PDS) and Additional Information Document (AID). The PDS, AID and Target Market Determination (TMD), is available on our website at australianunity.com.au/wealth.

Past performance is not a reliable indicator of future performance.

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