

# Fax Agreement Form

## Tax Minimiser Investment Bond

Please **PRINT** clearly in **BLACK or BLUE** pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

### 1. Investor Details

Policy number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		
Title	<input checked="" type="checkbox"/> Mr <input checked="" type="checkbox"/> Mrs <input checked="" type="checkbox"/> Ms <input checked="" type="checkbox"/> Miss	Date of birth	<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 Full name	<input type="text"/>		
Residential address (not a PO Box)	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Phone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		
Investor 2 Full name	<input type="text"/>		
Residential address (not a PO Box)	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/> <input type="text"/> <input type="text"/>
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Phone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		
Is this agreement to apply to all investment(s) held?	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

### 2. Conditions for Fax Communication Option

If you wish to make a withdrawal or amend your records or communication with us in any way by fax, please take the time to read the following section. You should understand that by electing to use the fax facility, you automatically agree to be bound by the conditions of the facsimile usage agreement details below.

When you send us fax instructions, you must:

- Send the fax to 'Lifeplan Funds Management' on fax number (08) 8212 2790, or such other fax number that we may advise from time to time.
- Ensure the fax is signed by all the authorised signatories to the investment.
- Include the names of all the investors, the policy number(s) and sufficient information to enable us to complete the transaction.

Lifeplan will only act on completed fax instruction. We may refuse to act on your fax instruction or refuse to act unless your instructions have been confirmed by other means. Lifeplan will not be liable for and will not compensate you for any loss or delay resulting from the non-receipt of any transmission.

### 3. Declaration and Signature(s)

☒ Yes, I/we elect to use the fax facility to communicate with Lifeplan.

By making the above election you agree to the terms and conditions for fax communications and release and indemnify Lifeplan against any liabilities whatsoever arising out of Lifeplan acting on any communications received by fax.

#### Investor 1 signature

X

Name of Investor 1

Date  /  /

#### Investor 2 signature

X

Name of Investor 2

Date  /  /

**Please note:** we require the original of this form returned prior to you commencing your communications by fax.



#### Return by post

(together with any identification documents where relevant)

**Australian Unity - Investment bonds, Reply Paid 89, Adelaide SA 5001**

(no stamp required if mailed in Australia)

If posting from outside of Australia, please send to Head Office:

**114 Albert Road, South Melbourne VIC 3205**



#### Fax

1800 804 890



#### Email

[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)

#### Contact us



Australian Unity  
114 Albert Road, South Melbourne VIC 3205



[australianunity.com.au/wealth](http://australianunity.com.au/wealth)

#### Investor Services



[enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)



1300 1300 38



1800 804 890

#### Adviser Services



[investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au)



1300 133 285



1800 804 890