

Additional Deposit Form



TaxSmart Investments

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

Title Mr Mrs Ms Miss Date of birth / /

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

2. Investment Details

Investor Option Selection

Cash Enhanced Option	\$	<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"/>	or	<input type="text"/> <input type="text"/> <input type="text"/>	%
High Yield Option	\$	<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"/>	or	<input type="text"/> <input type="text"/> <input type="text"/>	%
Growth Option	\$	<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"/>	or	<input type="text"/> <input type="text"/> <input type="text"/>	%
Australian Shares Option	\$	<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"/>	or	<input type="text"/> <input type="text"/> <input type="text"/>	%
TOTAL	\$	<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"/>	or	<input type="text"/> <input type="text"/> <input type="text"/>	% Total must equal 100%

If no Option is selected, the deposit amount will be disbursed to your policy as per your existing investment Option percentages.

3. Method of Payment

- BPAY®** – Biller Code 899138 – for details of your Customer Reference number, please call our Investor Services Team on 1300 133 38.
- CHEQUE** – please make the cheque payable to “Lifeplan Australia Friendly Society Limited, <investor name>” and cross it “Not Negotiable”. Third party cheques are not accepted.

4. Declaration and Signature(s)

I/We confirm that I/we have a copy of the current Product Disclosure Statement (PDS) and that I/we have read, understood and retained this for future reference.

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 2

Date / /



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

Contact us



Australian Unity
114 Albert Road, South Melbourne VIC 3205



australianunity.com.au/wealth

Investor Services



enquiries@australianunity.com.au



1300 1300 38



1800 804 890

Adviser Services



investmentbonds@australianunity.com.au



1300 133 285



1800 804 890