

# Withdrawal Request 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  Please withdraw funds from my current options  Funds Specified in Step 3

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. Type of Withdrawal

Full Withdrawal (interim bonus rate will apply to the Capital Guaranteed Fund for full withdrawals)

Partial Withdrawal - (Minimum Amount \$500) Amount required \$

Regular Withdrawal - (Minimum Amount \$100) Amount required \$

### 3. Specific Investment Fund Withdrawal Details (see PDS for option details)

#### Investment Fund Selection

Multi-Manager Australian Shares	\$	<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"/>	%
Multi-Manager Conservative Fund	\$	<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"/>	%
Multi-Manager Moderate Fund	\$	<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"/>	%
Multi-Manager Growth Fund	\$	<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"/>	%
Multi-Manager Global Share Fund	\$	<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"/>	%
Capital Guaranteed Fund	\$	<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"/>	%
Capital Secure Fund	\$	<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"/>	%
Property Securities Fund	\$	<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 Fund	\$	<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"/>	%
Global Shares Fund	\$	<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"/>	%
Managed Investment Fund	\$	<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 Investment Fund	\$	<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 Growth Fund	\$	<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"/>	%
Enhanced Yield Fund	\$	<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"/>	%

#### Step 4. Financial Institutional Account Details

Bank Name	<input type="text"/>	Branch	<input type="text"/>
Branch Number (BSB)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Account 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"/>
Account Name	<input type="text"/>		

#### Step 5. To better understand our investor needs, please indicate reason for withdrawal below:

<input type="checkbox"/> Living expenses	<input type="checkbox"/> Purchase property	<input type="checkbox"/> Pay off debts
<input type="checkbox"/> Invest in superannuation	<input type="checkbox"/> Invest elsewhere	<input type="checkbox"/> Purchase car
Other <input type="text"/>		

#### Step 6. Declaration and Signature(s)

In consideration of payment of the value of that part of my investments listed above

I hereby waive all rights to further claims under the above investments for that part of the benefit so withdrawn.

##### Investor 1 signature

Name of Investor 1

Date  /  /

##### Investor 2 signature

Name of Investor 2

Date  /  /

**Note:** If under 16 years of age - both parents or guardians to sign and identification is required. Payment will be distributed five days from the date request received. Direct Bank Credit funds cleared immediately after they have been credited to your nominated account. Cheques are available on request, please contact Investor Services on 1300 1300 38 for further information. For security reasons no 3rd party bank credits or cheques will be processed.



#### 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:

**111 Gawler Place, Adelaide SA 5000**



#### Fax


1800 804 890




#### Email


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


#### Contact us


 Australian Unity  
111 Gawler Place, Adelaide SA 5000

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


#### Investor Services


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 1300 1300 38

 1800 804 890

#### Adviser Services

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

 1300 133 285

 1800 804 890