

# 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)  
To view your investment interim rate please view online at [australianunity.com.au/investment-bonds-performance](http://australianunity.com.au/investment-bonds-performance)

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"/>		

#### Important information about your withdrawal:

We care about keeping your account safe so there are circumstances where we will need to contact you and verify your details before releasing your payment. These circumstances may include:

- The bank account you've nominated is different to the bank account recorded on your file
- Your signature doesn't match the signature recorded on your file
- We need to verify other details relating to your request.

#### 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 part of my Investment(s) specified in this request, I confirm that I waive all rights to further claims of the benefit of the part(s) of the Investments I am withdrawing.

#### 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. For security reasons no 3rd party bank credits will be processed.



#### Return by post

**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:  
**271 Spring Street, Melbourne VIC 3000**



#### Email

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

#### Contact us

- Australian Unity  
271 Spring Street, Melbourne VIC 3000
- [australianunity.com.au/wealth](http://australianunity.com.au/wealth)

#### Investor Services

- [enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au)
- 1300 1300 38

#### Adviser Services

- [investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au)
- 1300 133 285