

# Switch Option Form



## Lifepan 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  Date of birth  /  /

Title  Mr  Mrs  Ms  Miss

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode  Country

Phone  Mobile

Email

### 2. Investment Option Alteration Request

Policy number  Switch Amount \$

Option Code	From Existing Details
<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"/> <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"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> %
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<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"/> <input type="text"/> . <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %

Option Code	To New Details
<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"/> <input type="text"/> . <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
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<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"/> <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"/> <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"/> <input type="text"/> <input type="text"/> <input type="text"/> %

Funds transferred - from existing options must equal transferred to new options. Total % must equal 100%.

**Note:** Please refer to the Product Disclose Statement for information available at [australianunity.com.au/wealth](http://australianunity.com.au/wealth) on investing transaction costs and up to date investment options information.

### 3. Regular Switching Facility (Optional)

Policy Number

#### Switch #1

I want to switch a total of % .  from the Fund Code #  each Month  Quarter   
as a series of switches into Fund Code #  % .   
as a series of switches into Fund Code #  or % .   
as a series of switches into Fund Code #  or % .

#### Switch #2

I want to switch a total of % .  from the Fund Code #  each Month  Quarter   
as a series of switches into Fund Code #  % .   
as a series of switches into Fund Code #  or % .   
as a series of switches into Fund Code #  or % .

#### Switch #3

I want to switch a total of % .  from the Fund Code #  each Month  Quarter   
as a series of switches into Fund Code #  % .   
as a series of switches into Fund Code #  or % .   
as a series of switches into Fund Code #  or % .

**Note:** The total series of switches into funds will need to equal the total amount being switched out.

### 4. Declaration and Signature(s)

I /We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained 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](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