

# Advice Fee Instruction Form

## Investment Bonds



### Important

This Advice Fee can only be applied to eligible funds. Please refer to the relevant Product Disclosure Statement (PDS) for more information about the Advice Fee.

Please note that if the relevant fund's PDS does not make mention of an Advice Fee, then it is NOT eligible for the Advice Fee to be applied.

Please:

- Use **BLOCK** letters and a black or blue pen to complete this Form
- Indicate using an 'X' where appropriate. If a section does not apply to you, please indicate using 'N/A'

### Complete this form if you wish to:

- Set up a new arrangement to pay your financial adviser an Advice Fee directly from your investment account, or change an existing Advice Fee arrangement; or
- Cancel an existing Advice Fee arrangement.

The Advice Fee payment reflects your arrangement with your financial adviser and is calculated and deducted (by way of withdrawal of units) on a monthly basis. You can choose a % of your average monthly investment balance. Please notify us if you change or cancel your arrangement with your adviser.

Your personal information will be collected, used and disclosed by us in accordance with our Privacy Policy and in accordance with the law. You can obtain a copy of our Privacy Policy via our website [australianunity.com.au/privacy-policy](http://australianunity.com.au/privacy-policy) or by telephone 1300 1300 38.

### Step 1 Investor details

Investment number/ Policy 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"/>		
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"/>
Name in full	<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"/>		

### Step 2 Your financial adviser

Financial adviser name	<input type="text"/>
Dealer group name	<input type="text"/>

### Step 3 Advice fee arrangement

#### Set-up arrangement or make a change

I/We request that Australian Unity deduct an Advice Fee on a monthly basis of: \$  .  %

This fee will be effective upon the receipt of this form by Australian Unity.

The Advice Fee can only be applied to eligible funds. Please refer to the applicable Product Disclosure Statement (PDS) for more information about the Advice Fee.

## Cancel arrangement

I/We request that Australian Unity cancel all existing Advice Fee arrangements associated with my investment account(s).

This cancellation will be effective upon the receipt of this form by Australian Unity.

## Step 4 Declaration and signature(s)

### I/We agree and acknowledge that:

- The Advice Fee agreed to will be paid directly from my/our investment account(s);
- I/We will not hold Australian Unity responsible for any advice (financial or otherwise), which my/our financial adviser may provide to me;
- I/We may terminate this arrangement at any time by giving written notice to Australian Unity; and
- My/our personal information will be collected, used and disclosed by Australian Unity in accordance with its Privacy Policy and in accordance with the law.

All policy signatories must sign below.

#### Investor 1

Print name

Date / /

Capacity  Individual  Joint  Director  Partner  
 Trustee  Other

#### Investor 2

Print name

Date / /

Capacity  Individual  Joint  Director  Partner  
 Trustee  Other

**Please note:** All policy holders must sign for a joint account. If signed under a Power of Attorney, the Attorney verifies that no notice of revocation of that power has been received. An original certified copy of the Power of Attorney and original certified copy of primary identification (driving licence or passport) for each Attorney must be provided if not provided previously. Company applications must be signed in accordance with their constitution. Sole signatories signing on behalf of a company must confirm that they are signing as sole director and as sole secretary of the company.



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



### Fax

**1800 804 890**



### Email

**investmentbonds@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