

# Withdrawal Request Form



## Investment Bonds

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

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

Policy Number         Please withdraw funds from my current options  Funds Specified in Step 4

### 3. 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 \$

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

#### Option Code

|  |  |   |
|--|--|---|
| <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"/> | or <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"/> | or <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"/> | or <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"/> | or <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"/> | or <input type="text"/> <input type="text"/> <input type="text"/> % |

### 5. Financial Institution Account Details

Bank Name  Branch

Branch Number (BSB)       Account Number

Account Name

#### 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.

**6. To better understand our investor needs, please indicate reason for withdrawal below:**

Purchase property     Purchase car     Purchase Other     Pay off a debt     Invest elsewhere

Other (please specify)

**7. 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.



**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