

Change of Details Form



Australian Unity Investment Bonds

Please phone the Investor Services Team on **1300 1300 38** if you have any questions.

Please **PRINT** clearly in **BLACK or BLUE** pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

1. Investor Number

Investor Number

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 or by telephone 1300 1300 38.

2. Investor Details

Title Mr Mrs Ms Miss Other (please Specify)

Date of birth / /

Surname

Given name(s)

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

3. New Investor Details

Title Mr Mrs Ms Miss Other (please Specify)

Date of birth / /

Surname

Given name(s)

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

Are you a US citizen or US tax resident?

Yes No

If 'Yes', please provide your Taxpayer Identification Number ('TIN')

Are you a Politically Exposed Person?

Yes No

Please identify the source of your investible assets or wealth:

Gainful employment
 Business activity

Inheritance/gift
 Superannuation savings

Financial investments
 Other – please specify:

4. Change of Details

Date of change

Reason for change

5. Notes

If you have a change of name we will require a certified copy of your marriage/divorce certificate

A residential address must be provided in all circumstances

6. Signature(s)

I/We declare that the information provided for meeting FATCA requirements (where applicable) is true and correct and that I/we will provide all necessary co-operation and assistance in order for us to comply with obligations under Australian legislation designed to give effect to the FATCA agreement between Australia and the United States.

Old signature

Print name

Date

New signature

Print name

Date



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

enquiries@australianunity.com.au

Contact us

Australian Unity
114 Albert Road, South Melbourne VIC 3205
 australianunity.com.au/wealth

Investor Services

enquiries@australianunity.com.au
 1300 1300 38
 1800 804 890

Adviser Services

investmentbonds@australianunity.com.au
 1300 133 285
 1800 804 890