

# Withdrawal Form

## FlexiGrowth Investment

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	<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"/> <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 (if not Australia)	<input type="text"/>		
Phone	<input type="text"/>	Mobile	<input type="text"/>
Email	<input type="text"/>		

### 2. Investment Details

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"/>	Commencement date	<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"/>
(Interim rate of interest will apply if an investment option is fully withdrawn prior to Performance Declarations).			
<input type="checkbox"/>	Full Withdrawal		
<input type="checkbox"/>	Partial Withdrawal - (Minimum Amount \$500)	Amount required \$	<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="checkbox"/>	Please withdraw from my current investment fund proportions		

### or Investment Option Selection

Capital Guaranteed Option	\$ <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"/> %
Income Option	\$ <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"/> %
Cash Enhanced Option	\$ <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 Yield Option	\$ <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"/> %

### 3. Financial institution 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"/>
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.

#### 4. Reason for Withdrawal

To help us better understand our customer's needs, we ask that you please indicate your reasons for withdrawal below.

- ☐ Purchase property/car ☐ Investment has reached maturity ☐ Payment of a debt
- ☐ Other purchase ☐ Income support/living expenses
- ☐ Investing elsewhere – please specify:

#### 5. Notes

- Minimum remaining balance is \$1,000 to keep your investment open. If your withdrawal takes your Plan below the minimum balance, we may treat your withdrawal request as a full withdrawal and credit you the full balance and close your Plan.
- Withdrawals from the High Yield Option require 25 business days notice.
- For security reasons no third party bank credits will be issued.

#### 6. 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 //



#### Return by email

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



#### Post

(together with any identification documents where relevant)

**Australian Unity - Investment Bonds, Reply Paid 93753 Melbourne VIC 8060**

(no stamp required if mailed in Australia)

If posting from outside of Australia, please send to:

**GPO Box 4397 Melbourne VIC 3001**

#### Contact us

- Australian Unity  
GPO Box 4397 Melbourne VIC 3001
- [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