

Withdrawal Option Form



TaxSmart Investments

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

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. Type of Withdrawal

Please choose one of the following

- Full Withdrawal (Interim rate of interest will apply if an interest paying investment option if fully withdrawn prior to performance declarations)
- Partial Withdrawal (minimum amount \$500)
- Please withdraw from my current investment fund proportions

Amount required \$

Or Investment Option Selection

Cash Enhanced Option \$ or %

High Yield Option \$ or %

Growth Option \$ or %

Australian Shares Option \$ or %

Total (Overall % must equal 100) \$ or %

3. Financial Institution Account Details

Bank Name

Address

Account Name

Branch Number (BSB) Account Number

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. To better understand our investor needs, please indicate reason your reason for withdrawal

- Purchased Property/Purchased Car
- Purchased other
- Payment of a debt
- Investment has reached maturity
- Income support/Living expenses

Invest elsewhere – please specify

Notes

- Minimum remaining balance \$1,000 to keep 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 3rd party bank credits will be issued.

5. 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 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

Contact us

- Australian Unity
271 Spring Street, Melbourne VIC 3000
- australianunity.com.au/wealth

Investor Services

- enquiries@australianunity.com.au
- 1300 1300 38

Adviser Services

- investmentbonds@australianunity.com.au
- 1300 133 285