

Additional Deposit and Regular Savings Plan 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

Policy number

Title Mr Mrs Ms Miss Date of birth / /

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Email

Mobile

2. Investment Details

Total Deposit Amount \$

I will be paying my investments by:

- BPAY®** – Biller Code 899138 – for details of your Customer Reference number, please call our Investor Team on 1300 1300 38 or refer to your Investment Statement issued annually.
- DIRECT DEBIT** – please complete Step Three confirming the frequency of the Direct Debit and also your financial institution account details at Step Four.

3. Direct Debit Details

Please confirm if this request is to Initiate Change Cancel

At least 3 business days notice is required for all requests. For Regular Savings the minimum monthly investment is \$50 per month for 10Invest and \$100 per month for all other investment bonds product.

Option 1 - Once Only

Once only amount \$ Collection date for direct debit / /

OR Option 2 - Regular Ongoing Savings Plan (continues indefinitely until otherwise advised in writing by the policy owners)

Regular Savings - please indicate frequency below Amount \$

Fortnightly Monthly Quarterly Start date for direct debit / /

4. Financial Institution Account Details

Bank Name	<input style="width: 95%;" type="text"/>	Branch	<input style="width: 95%;" type="text"/>
Branch Number (BSB)	<input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/>	Account Number	<input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/> <input style="width: 25px;" type="text"/>
Account name	<input style="width: 95%;" type="text"/>		

Direct Debit Request Authorisation

- I/We authorise Lifeplan (User ID Number: 026445) to debit this nominated account with the contribution shown and/or the direct debit cycle I have selected in Step Three.
- I/We have read the Direct Debit Client Services agreement provided within the Product Disclosure Statement and agree with its terms and conditions.
- I/We acknowledge that I/we may obtain a copy of the Client Service agreement at any time by contacting Investor Services on 1300 1300 38.
- I/We acknowledge that this authority will remain in force until written notice is received to cancel/alter this authority.

Direct Debit Authority

Investor 2 signature

Signature of Account Owner 1

Signature of Account Owner 2

X

X

5. Option Selection

As per my existing option split

OR Please specify the amount you wish to invest in each option, details of current investment options are available in the current Product Disclosure Statement.

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Total % must equal 100%. Total \$ must equate to the Total Deposit Amount \$ entered above in Step Two.

6. Declaration and Signature(s)

I/We confirm that I/we have a copy of the current Product Disclosure Statement (PDS) and that I/we have read, understood and retained for future reference.

I/We acknowledge that the Direct Debit arrangement (if applicable) is governed by the terms of the Direct Debit Client Service Agreement that is available on request.

Investor 1 signature

Name of Investor 1

Date / /

Investor 2 signature

Name of Investor 2

Date / /



Return by post

(together with any identification documents where relevant)

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

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 1300 1300 38

Adviser Services

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 1300 133 285