

# Switch Request 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  Date of birth  /  /

Title  Mr  Mrs  Ms  Miss

Name in full

Residential address (not a PO Box)

Suburb  State

Postcode  Country

Phone  Mobile

Email

### 2. Alteration Request

#### Investment Options

	Existing Details (\$ or %)		To New Details (\$ or %)	
Cash Enhanced Option	\$ <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"/>	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"/>	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"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
Growth Option	\$ <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"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares Option	\$ <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"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b>	\$ <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"/>	or <input type="text"/> <input type="text"/> <input type="text"/> %

Total % must equal 100%.

### 3. Notes

- The minimum switch is \$500 per Investment Option.
- A maximum of 12 switches are permitted in any rolling 12 month period commencing on your start date.
- Switches from the High Yield Option require 25 business days notice.

#### 4. 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 understand, from date of acceptance of this form, my investment funds will be switched as per my instructions provided.

##### 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:

**114 Albert Road, South Melbourne VIC 3205**



#### Fax


1800 804 890




#### Email


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


#### Contact us


 Australian Unity  
114 Albert Road, South Melbourne VIC 3205

 [australianunity.com.au/wealth](http://australianunity.com.au/wealth)


#### Investor Services


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


 1300 1300 38

 1800 804 890

#### Adviser Services

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

 1300 133 285

 1800 804 890