

# Investment Withdrawal Request Form



## Australian Unity 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(s) 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"/>	
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	<input type="text"/>										
Phone	<input type="text"/>					Mobile	<input type="text"/>									
Email	<input type="text"/>															

### 2. Investment Details

Plan/Policy number	<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 checked="" type="checkbox"/> Full Withdrawal (Interim rate of interest will apply if an investment option is fully withdrawn prior to bonus declaration) To view your investment interim rate please view online at <a href="http://australianunity.com.au/investment-bonds-performance">australianunity.com.au/investment-bonds-performance</a>																		
<input checked="" 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="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<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"/>	Account 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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account name	<input type="text"/>																	

### 4. Reason for Withdrawal

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

<input checked="" type="checkbox"/> Purchase property/car	<input checked="" type="checkbox"/> Other purchase	<input checked="" type="checkbox"/> Payment of a debt
<input checked="" type="checkbox"/> Investment has reached maturity	<input checked="" type="checkbox"/> Income support/living expenses	
<input checked="" type="checkbox"/> Invest elsewhere - please specify	<input type="text"/>	

## 5. Notes

- If you are under 16 years of age, both parents or guardians are required to sign and identification is required.
- Minimum remaining balance is \$1,000 to keep your investment open.
- Payment will be made 7 days from the date that the request is received.
- Direct Bank Credit funds cleared immediately after they have been credited to your nominated account.
- Cheques are available on request – please contact us for further information.
- For security reasons no third party bank credits will be issued.

## 6. Declaration and Signature(s)

In consideration of payment of the value of that investment listed, I hereby waive all rights to further claim on the Society under the above investment for that part of the benefit so withdrawn.

### 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