

Tax Minimiser Investment Bond

Please PRINT clearly in BLACK or BLUE pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

Please complete Step 1, 2 and 4 if you would like to instruct a once off switch request, otherwise complete Step 1, 3 and 4 to establish a Regular Switching Facility.

1. Personal Details																						
Policy number											Dat	e of bi	rth]/[/				
Title	X Mr	X	Mrs	\times	Ms	X	Mis	SS														
Name in full																						
Residential address (not a PO Box)																					 	
Suburb																			Stat	e		
Postcode					Cour	1try																
Phone										M	1obi	le										
Email																						
2. Alteration Request	(Optiona	al)																				
Policy number																						
Investment Fund Selection	I	From	ı Exis	ting [)etai	ils (%	or \$)				To N	ew D	etails	(%	or \$	5)					
Multi-Manager Conservative	Fund				% \$										%	\$						
Multi-Manager Moderate Fu	nd				% \$										%	\$						
Multi-Manager Growth Fund	l				% \$										%	\$						
Multi-Manager Australian Sh	are Fund				% \$										%	\$						
Multi-Manager Global Share	Fund				% \$										%	\$						
Capital Guaranteed Fund					% \$										%	\$						
Capital Secure Fund					% \$										%	\$						
Managed Investment Fund					% \$										%	\$						
Growth Investment Fund					% \$										%	\$						
Australian Shares Fund					% \$										%	\$						
Global Shares Fund					% \$										%	\$						
Property Fund					% \$										%	\$						
High Growth Fund					% \$										%	\$						
Enhanced Yield Fund					% \$										%	\$						
TOTAL					% \$]				%	\$						

Notes: Total % must equal 100%. The minimum switch is \$500 per Investment Fund. A maximum of 12 switches are permitted in any rolling 12 month period commencing on your start date. Transaction costs are disclosed in the current Product Disclosure Statement will apply to your switch reques if applicable.

3. Regular Switching Facility (Optional)

Policy Number			
Investment Fund	Code	Investment Fund	Code
Multi-Manager Conservative Fund	624	Managed Investment Fund	613
Multi-Manager Moderate Fund	625	Growth Investment Fund	618
Multi-Manager Growth Fund	626	Australian Shares Fund	619
Multi-Manager Australian Share Fund	627	Global Shares Fund	620
Multi-Manager Global Share Fund	628	Property Fund	621
Capital Guaranteed Fund	610	High Growth Fund	622
Capital Secure Fund	612	Enhanced Yield Fund	629

Switch #1

I want to switch a total of %	from the Fund Code #	each Month Quarter
as a series of switches into Fund Code #		
as a series of switches into Fund Code #	or %	
as a series of switches into Fund Code #	or %	
Switch #2		
I want to switch a total of %	from the Fund Code #	each Month Quarter
as a series of switches into Fund Code #	or %	
as a series of switches into Fund Code #	or %	

Switch #3

I want to switch a total of %	from the Fund Code #		each Month	Quarter
as a series of switches into Fund Code #		%		
as a series of switches into Fund Code #		%		
as a series of switches into Fund Code #		%		

Note: The total series of switches into funds will need to equal the total amount being switched out.

4. Declaration and Signature(s)

- I/We confirm that I/we have a copy of the current Product Disclosure Statement 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 Lifeplan Direct Debit Client Service Agreement and that is available on request from Lifeplan.

Investor 1 signature

Investor 2 signature

X	X
Name of Investor 1	Name of Investor 2
Date / / / / / /	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



1800 804 890

Fax

Email enquiries@australianunity.com.au

Contact us

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Investor Services

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- 1800 804 890

Adviser Services



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