

Additional Investment Direct Debit Form



Please:

Use **BLOCK** letters and a black or blue pen to complete this Form.

Please indicate using an "X" where appropriate. If a section does not apply to you, please indicate using "N/A".

Office use only

Step 1 Investor details

Account name

Account number

Title Mr Mrs Ms Miss Dr other

Surname

Given name(s)

Date of birth

Unit Street number P.O. Box

Street name

Suburb State

Postcode Country (if not Australia)

Phone (business hours) Mobile Phone

Email

Preferred contact method Phone Email

Step 2 Additional investment instructions

I wish to add to my:

<input type="checkbox"/> Capital Guaranteed Bond	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Capital Guaranteed Mortgage Bond	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Conservative Growth Bond	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Balanced Growth Bond	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> High Growth Bond	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Education Savings Plan - Short Term Portfolio	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Education Savings Plan - Medium Term Portfolio	\$ <input style="width: 100%;" type="text"/>
<input type="checkbox"/> Education Savings Plan - Long Term Portfolio	\$ <input style="width: 100%;" type="text"/>

Step 3 Cheque or direct debit

I authorise payments from the following account:

Name of financial institution

Account name

Branch number (BSB) - Account number

Commencing on / / and until further notice Australian Unity is to

Debit \$ from the account specified each (please tick on box only)
 Month Quarter Half year Year

OR I enclose my cheque payment for \$ to Australian Unity Limited

Step 4 Authorisation

I have read and understood the Australian Unity Direct Debit Request (DDR) Service Agreement.

Signature

Print name

Date / /



Please send this form to:

Australian Unity
Reply Paid 64466
South Melbourne VIC 3205
(no stamp required if mailed in Australia)

OR

Forward this form to your financial adviser

Contact us

Australian Unity
114 Albert Road, South Melbourne VIC 3205

australianunity.com.au

Investor Services

investments@australianunity.com.au

13 29 39

03 8682 5057

Adviser Services

investments@australianunity.com.au

1800 649 033

03 8682 5057

Direct Debit form service agreement

Our commitment to you

This document sets out your rights, our commitment to you and your responsibilities to us together with where you should go for assistance in respect of your direct debit arrangement with Australian Unity.

Initial terms of the arrangement

In terms of the DDR arrangement made between us and signed by you, we undertake to periodically debit your nominated account in accordance with your signed authority to direct debit.

Drawing arrangements

If any drawing falls due on a non-business day, it will be debited from your account on the next business day following the scheduled drawing date. We will give you at least 14 days written notice when we intend to make changes to the initial terms of the arrangement.

Your rights

Changes to the arrangement

If you want to make changes to the drawing arrangements, please notify us in writing at least 4 business days prior to your next scheduled drawing date. These changes may include:

- Deferring the drawing
- Altering the schedule
- Stopping an individual debit
- Suspending the DDR
- Cancelling the DDR completely

Enquiries

If you have any enquiries they should be directed to Australian Unity, rather than to your financial institution.

All personal customer information held by us will remain confidential except for information that may be provided to our financial institution to initiate the drawing to your nominated account or information may be disclosed to a third party as required by law. Information may also be provided to Australian Unity Limited or any of its wholly owned subsidiaries to enable the DDR to be effected as required by law.

Disputes

If you believe that a drawing has been initiated incorrectly, you should raise the matter directly with Australian Unity.

If you do not receive a satisfactory response from us, contact your financial institution who will respond to you with an answer to your claim:

- within 7 business days (for claims lodged within 12 months of the disputed drawing) or
- within 30 business days (for claims lodged more than 12 months after the disputed drawing).

You will receive a refund of the drawing amount if we can not substantiate the reason for the drawing.

Note: Your financial institution will ask you to contact us to resolve your disputed drawing prior to involving them.

Your commitment to us

It is your responsibility to ensure that:

- your nominated account can accept direct debits (your financial institution can conform this)
- that on the drawing date there is sufficient cleared fund in the nominated account

If your drawing is returned or dishonoured by your financial institution, we will notify you in writing. Any transaction fees payable by us in respect of the above may be passed on to you. Consecutive returns or dishonours may result in the direct debit facility being withdrawn.