

Switch/Extension 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. Member details

Policy Number

Title Mr Mrs Ms Miss Date of birth / /

Name in full

Residential address (not a PO Box)

Suburb State

Postcode Country

Phone Mobile

Email

2. Investment instructions

	Example	A	B	C	D
Policy number(s)	IPO123456				

3. Switching

You can switch between the different investment options within Tax Smart's range. Switching is **free of charge**. There is minimum switching amount of \$1,000 (you must maintain a minimum of \$500 in each investment option).

	Example	A	B	C	D
Capital Guaranteed	20%				
Capital Guaranteed Mortgage	20%				
Conservative Growth	20%				
Balanced Growth	20%				
High Growth	20%				
Total	100%	100%	100%	100%	100%

4. Extension of term

Please alter the term of my/out bond listed in section 1 so that:

	Example	A	B	C	D
The term is extended by	5 years				

OR

	Example	A	B	C	D
The term is mature on	01/07/2009				

5. Authorisation

I/We being the Bond Owner(s) of the Bonds listed above instruct and authorise the transactions as indicated above. For any withdrawals listed, I/We agree that the payment of such amount shall be full and sufficient discharge of the liability of Australian Unity in respect of the benefits surrendered.

Signature of Claimant

X

Date / /

6. Verification and certification

A verification document is required in support of this redemption request. Please provide a certified copy of any of the following that verify your (the applicants) full name, date of birth and current address:

Please place a tick in the document type that you have supplied.

Birth Certificate
 Citizenship Certificate
 Pension Card
 Drivers Licence
 Passport

Certification of documents

Where your identification documents need to be certified, we suggest that the person certifying the document(s) for you use the following statement on the copy being certified:

'I certify this to be a true copy of [name of document] the original of which, was produced to me at the time of signing'.

The document must also be dated, and have the signature, printed name, occupation, employer and address of the person certifying the document.

List of persons who can certify copies of original documents:

- Accountants (members of the Institute of Chartered Accountants, the Australian Society of CPA's or the National Institute of Accountants).
- Aldermen or Councillors of Municipal or Shire Councils.
- Bank, Building Society and Credit Union employees and agents authorised by their institution to open accounts.
- International Banks employees authorised by their institution to open accounts where the International Bank engages in a transaction with a cash dealer.
- Bailiffs.
- Barristers.
- Clerks of Courts.
- Clerks of Petty Sessions.
- Commissioned officers currently serving in the defence forces.
- Dentists.
- Diplomatic or consular officers to an Australian Embassy.
- Holders of statutory offices for which an annual salary is payable.
- Insurance company full-time employees who have been employee continuously for at least five years by such company.
- Judges and Masters of Federal or State Parliament.
- Justice of the Peace.
- Members of an Aboriginal community council and recognised community elders of an Aboriginal community.
- Medical Practitioners.
- Members of Federal or State Parliament.
- Members of the Legislative Assembly of the ACT, Northern Territory or Norfolk Island.
- Ministers of Religion who are authorised Marriage Celebrants.
- Notaries public.
- Nursing sisters.
- Pharmacists.
- Police officers in charge of police stations.
- Police officers in the rank of Sergeant or any greater ranking.
- Postal managers.
- Public employees - current full-time employees of Commonwealth, State, Territory or Local Governments or Statutory Authorities, who have been employees for at least 5 years by one or more of those employers.
- Registrars of Federal or State Courts.
- Sheriffs.
- Solicitors.
- Stipendiary Magistrates.
- Teachers - full time, who have been teaching for more than 5 years at schools or tertiary institutions.



Return by post

(together with any identification documents where relevant)

Australian Unity, Reply Paid 64466, South Melbourne VIC 3205

(no stamp required if mailed in Australia)

If posting from outside of Australia, please send to:

114 Albert Road, South Melbourne VIC 3505



Fax

03 8682 5057

Contact us



Australian Unity Investor Services
114 Albert Road, South Melbourne VIC 3205



australianunity.com.au/wealth

Investor Services



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