

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 type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input 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 type="checkbox"/> Full Withdrawal (Interim rate of interest will apply if an investment option is fully withdrawn prior to bonus declaration)																		
<input 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 type="checkbox"/> Purchase property/car	<input type="checkbox"/> Other purchase	<input type="checkbox"/> Payment of a debt
<input type="checkbox"/> Investment has reached maturity	<input type="checkbox"/> Income support/living expenses	
<input 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:


111 Gawler Place, Adelaide SA 5000




Fax


1800 804 890


Contact Us


 Australian Unity
111 Gawler Place, Adelaide SA 5000

 australianunity.com.au/wealth

Investor Services


 enquiries@australianunity.com.au


 1300 1300 38

 1800 804 890

Adviser Services

 investmentbonds@australianunity.com.au

 1300 133 285

 1800 804 890