

Additional Investment Direct Debit Form

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

1. Investor details

Account number

Title Mr Mrs Ms Miss Date of birth / /

Surname

Given name(s)

Residential address (not a PO Box)

Suburb State Postcode

Country (if not Australia)

Phone Mobile

Email

Preferred contact method Phone Email

2. Additional investment instructions

I wish to add to my:

<input checked="" type="checkbox"/> Capital Guaranteed Bond	\$ <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 checked="" type="checkbox"/> Capital Guaranteed Mortgage Bond	\$ <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 checked="" type="checkbox"/> Conservative Growth Bond	\$ <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 checked="" type="checkbox"/> Balanced Growth Bond	\$ <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 checked="" type="checkbox"/> High Growth Bond	\$ <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 checked="" type="checkbox"/> Education Savings Plan – Short Term Portfolio	\$ <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 checked="" type="checkbox"/> Education Savings Plan – Medium Term Portfolio	\$ <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 checked="" type="checkbox"/> Education Savings Plan – Long Term Portfolio	\$ <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. Cheque or direct debit

I authorise payments from the following account:

Name of financial institution

Account name

Branch number (BSB) - Account number

Commencement date / /

Amount to be debited \$, , .

Frequency Monthly Quarterly Half yearly Yearly

OR

I enclose my cheque payment to Australian Unity for:

\$, , .

4. Authorisation

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

Signature 1

Print name

Date / /

Signature 2

Print name

Date / /



Return by email

investments@australianunity.com.au



Post

Send completed form together with relevant identification documents.

Within Australia

Australian Unity – Investment Bonds
Reply Paid 91914
Melbourne VIC 3000
*(No stamp required if mailed
within Australia)*

Outside Australia

Australian Unity
GPO Box 4397
Melbourne VIC 3001

Contact us

Investor Services

1300 1300 38

australianunity.com.au/wealth

Direct Debit Request 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.