

# Consent for Ongoing Adviser Service Fees

## Adviser Service Fee

Name of practice

is required by law to obtain your written consent before the ongoing fees can be deducted from your account with Lifeplan Australia Friendly Society Limited (LAFS). By completing this form, you are providing consent to pay ongoing adviser service fees to your nominated financial adviser. Please read the form carefully to ensure this accurately reflects the agreement with your adviser. If you have any questions, please feel free to contact your adviser.

**Please note:** Your consent will cease to have effect up to 150 days after the anniversary date and you can withdraw your consent, terminate or vary this ongoing fee arrangement at any time by writing to your adviser. If you do not provide written consent to deduct ongoing fees, we are legally obliged to cease the fees that you pay.

Policy number  
(if known)

### Investor / joint investor details

#### Investor 1

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Surname

Given names

Residential address  
(not a PO Box)

Suburb  State    Postcode

Country (if not Australia)

Phone  Mobile

Email

#### Investor 2

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Surname

Given names

Residential address  
(not a PO Box)

Suburb  State    Postcode

Country (if not Australia)

Phone  Mobile

Email

**Financial adviser details**

Adviser full name

Dealer Group  AFSL

Office address (not a PO Box)

Suburb  State  Postcode

Country (if not Australia)

Phone  Mobile

Email

**Adviser service type**

New ongoing fee arrangement  Change in adviser fee arrangements  Renewal

**How long does your consent last?**

From // to // you agree to pay the fees outlined in the section below.

Your consent expires on // which is 1 year plus 150 days after your anniversary date.

**What amount of ongoing fees will you pay?**

**Exact / Flat Fees**

You will pay the following ongoing fee(s) from the account noted below:

Product name / Policy number	Policy owner(s)	Fee amount (inc GST) / month
		\$
		\$
<b>Total fees for the next 12 months</b>		\$

**Reasonable estimate / %FUA**

We estimate you will pay the following ongoing fee(s) from the account noted below:

Product name / Policy number	Policy owner(s)	Current investment balance	Agreed percentage fee	Estimated fee (inc GST) / month
		\$	%	\$
		\$	%	\$
<b>Total estimate of fees for the next 12 months</b>				\$

Please be aware this is an estimate of fees only based on your current investment balance(s) and an agreed percentage fee as noted in the table to be applied at the time the deduction is processed.

### What happens if we don't receive your consent?

Without receipt of the subsequent written consent to deduct ongoing fees prior to the consent expiring, our ongoing service agreement terminates. This means that your adviser will have to ask for you to sign a new ongoing service agreement if we are to recommence deducting ongoing fees from your account in return for ongoing services.

### How can you withdraw your consent?

You may vary or withdraw your consent at any time by notifying your adviser in writing at the contact details on page 1 of this form.

### Client authorisation

By signing below, you give consent to both of:

- (i) the deduction of ongoing fees, as outlined in this notice; and
- (ii) the method of payment of those ongoing fees.

#### Signature 1

Name

Date   /

#### Signature 2

Name

Date   /



#### Return by email

[investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au)



#### Post

(together with any identification documents where relevant)

Australian Unity – Investment Bonds  
Reply Paid 93753 Melbourne VIC 8060

*(No stamp required if mailed within Australia)*

**If posting from outside Australia, please send to:**

GPO Box 4397 Melbourne VIC 3001

#### Contact us

**Adviser Services**

**1300 133 285**

**[australianunity.com.au/wealth](http://australianunity.com.au/wealth)**