

**Australian
Unity**
Real Wellbeing

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

Policy number																
Title	☒ Mr	☒ Mrs	☒ Ms	☒ Miss	Date of birth			/			/					
Name in full																
Residential address (not a PO Box)																
Suburb													State			
Postcode					Country											
Email																
Mobile																

Total Deposit Amount \$

I will be paying my investments by:

- ☐ **BPAY®** – Biller Code 899138 – for details of your Customer Reference number, please call our Investor Team on 1300 1300 38 or refer to your Investment Statement issued annually.
- ☐ **DIRECT DEBIT** – please complete Step Three confirming the frequency of the Direct Debit and also your financial institution account details at Step Four.

Please confirm if this request is to ☐ Initiate ☐ Change ☐ Cancel

At least 3 business days notice is required for all requests. For Regular Savings the minimum monthly investment is \$50 per month for 10Invest and \$100 per month for all other investment bonds product.

☒ Once only amount \$ Collection date for direct debit / /

☒ Regular Savings - please indicate frequency below Amount \$

☒ Fortnightly ☒ Monthly ☒ Quarterly Start date for direct debit / /

4. Financial Institution Account Details

Bank Name		Branch	
Branch Number (BSB)		Account Number	
Account name			

Direct Debit Request Authorisation

- I/We authorise Lifeplan (User ID Number: 026445) to debit this nominated account with the contribution shown and/or the direct debit cycle I have selected in Step Three.
- I/We have read the Direct Debit Client Services agreement provided within the Product Disclosure Statement and agree with its terms and conditions.
- I/We acknowledge that I/we may obtain a copy of the Client Service agreement at any time by contacting Investor Services on 1300 1300 38.
- I/We acknowledge that this authority will remain in force until written notice is received to cancel/alter this authority.

Direct Debit Authority

Investor 2 signature

Signature of Account Owner 1

Signature of Account Owner 2

5. Option Selection

☒ As per my existing option split

OR Please specify the amount you wish to invest in each option, details of current investment options are available in the current Product Disclosure Statement.

	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
	\$	or	%
TOTAL	\$	or	%

Total % must equal 100%. Total \$ must equate to the Total Deposit Amount \$ entered above in Step Two.

6. Declaration and Signature(s)

I/We confirm that I/we have a copy of the current Product Disclosure Statement (PDS) and that I/we have read, understood and retained for future reference.

I/We acknowledge that the Direct Debit arrangement (if applicable) is governed by the terms of the Direct Debit Client Service Agreement that is available on request.

Investor 1 signature

X

Name of Investor 1

Date / /

Investor 2 signature

X

Name of Investor 2

Date / /



Return by email

enquiries@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 in Australia)

If posting from outside of Australia, please send to:
GPO BOX 4397 Melbourne VIC 3001

Contact us

Australian Unity
GPO BOX 4397 Melbourne VIC 3001
 australianunity.com.au/wealth

Investor Services

enquiries@australianunity.com.au
 1300 1300 38

Adviser Services

investmentbonds@australianunity.com.au
 1300 133 285