

Direct Debit Authority

This form is only to be used when **adding** funds to an investment.
If a withdrawal is required please call our enquiries number on 1300 1300 38.

Step One

Your Details

Plan Sponsor One

Title _____ Surname _____

Given Names _____

Address _____

Suburb _____

State _____ Postcode _____

Company/Trust/Other _____

Student Beneficiary

Title _____ Surname _____

Given Names _____

Address _____

Suburb _____

State _____ Postcode _____

Company/Trust/Other _____

Step Two

Plan Details

Plan Number _____

Step Three

Fixed Amount Request

Please indicate if this request is to: Initiate Change account details Change amount Cancel

I/We request that Lifeplan Australia Friendly Society User ID 026445 draw by the way of the

Direct Debiting System, \$ _____ starting, _____

Step Four

Frequency

Monthly (this will occur on the 15th day of each month).

Weekly Fortnightly Every 4 weeks Once only Deduction date _____

(Please allow a minimum of 3 business days for commencement)

Step Five

Account Details

Bank _____

Branch name _____

BSB number _____

Account number _____

Account name _____

Step Six

Signature Details (All Plan Sponsors and account holders must sign and date this form)

I/We acknowledge that this Direct Debit arrangement is governed by the terms of the Lifeplan Direct Debit Client Agreement as set out on the next page of this request.

Signature Of Plan Sponsor One _____ Date _____

Signature Of Plan Sponsor Two (joint applicant) _____ Date _____

Please sign below if account holders are different to Plan Sponsors (if joint account all signatures required).

Signature Of Plan Sponsor One _____ Date _____

Signature Of Plan Sponsor Two _____ Date _____



For enquiries please call 1300 1300 38

111 Gawler Place, Adelaide SA 5000 **Postal Address** Reply Paid 89 Adelaide SA 5001 **Telephone** (08) 8212 3838 **Facsimile** (08) 8212 2790
Customer Service Telephone 1300 1300 38 **Email** enquiries@lifeplan.com.au **Website** lifeplan.com.au

Lifeplan Funds Management is a business name of Lifeplan Australia Friendly Society Limited ABN 78 087 649 492 AFSL 237989
Lifeplan Australia Building Society Limited ABN 30 087 652 079 AFS Licence 237994

Lifepan Direct Debit - Client Service Agreement

(Original: Lifepan Financial Group - Duplicate: Customer Copy).

Our commitment to you

We will give a copy of this Client Service Agreement to all new customers lodging a Direct Debit request form and to any other customer on request.

The initial terms of your Direct Debit arrangement will be clearly outlined in a letter which will be sent to you within three business days of receipt of your Direct Debit Request form.

We will advise you, in writing of any change to the Lifepan Direct Debit Client Service Agreement at least 14 calendar days prior to the date of any such change.

Where the date nominated for the debit to be made ("Due Date") falls on a non business day, we will draw the amount on the next business day. Where drawings relate to a Friendly Society Bond plan, we will draw the amount on the next business day.

We will not change the amount of frequency of drawing arrangements without your prior approval.

We reserve the right to cancel the Lifepan Direct Debit drawing arrangements if three or more drawings are returned unpaid by your nominated Financial Institution and to arrange with you an alternative payment method.

We will keep your personal information private and confidential except to the extent that we may share information with our related entities to inform you about other products and services. You may advise us in writing if you wish to prohibit the sharing of that information.

We will resolve any dispute of a Direct Debit drawing within seven business days and in the course of resolution we may share information with Lifepan's Direct Debit sponsor.

Your rights

You may terminate the Lifepan Direct Debit drawing arrangements at any time by giving written notice to us. Such notice should be received by us at least 3 business days prior to the Due Date.

You may also stop payment of a drawing under Lifepan Direct Debit by giving written notice. Such notice should be received by us at least 3 business days prior to the Due Date.

You may request change to the drawing amount and/or frequency of the Lifepan Direct Debit drawings by advising us in writing of your requirements no less than 3 business days prior to the Due Date.

You may dispute a Lifepan Direct Debit drawing by advising us in writing of the full details of the transaction. You must include the account numbers of both the account to be debited and credited, the amount, date, nature and circumstances of the disputed transaction. Lifepan will investigate your claim and in the event of a debit being transacted incorrectly a full refund will be provided within seven days.

Your commitment to us

It is your responsibility to ensure that the nominated account can accept direct debits and that sufficient cleared funds are available in the nominated account to meet a drawing on its Due Date.

It is your responsibility to ensure that the authorisation given to draw on the nominated account, is identical to the account signing instruction held by the Financial Institution where the account is based.

It is your responsibility to advise us in writing if the account nominated by you to be debited is transferred or closed.

It is your responsibility to arrange with us a suitable alternate payment method if the Lifepan Direct Debit drawing arrangements are cancelled either by yourselves or the nominated Financial Institution.

It is your responsibility to contact Lifepan direct for any query or dispute in relation to any Direct Debit transactions. Please direct all telephone enquiries to 1300 1300 38.

For enquiries please call 1300 1300 38

Return by Fax to:

If you ticked "Fax Communication Option" on your application form you can fax us the form on (08) 8212 2790

Return by Post to:

Reply Paid 89
Lifepan Funds Management
GPO Box 89, Adelaide SA 5001

