

Direct Debit Request Form

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

1. Your details

Investor(s)

Title Surname

Given Names

Address

Suburb State Postcode

Contact details: Telephone Email

2. Investment details

Policy Number Fund Name

3. Fixed amount request

I/we request that Lifeplan Australia Friendly Society User ID 026445 draw by the way of the Direct Debit System, the amount of: \$

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

3a. Frequency

Please select frequency

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

weekly Fortnightly Every 4 weeks

Once Only Deduction Date

4. Account details

Bank Branch name

BSB number Account number

Account name

5. Signature details (All Applicants and Account Holders must sign and date this form)

I/we request that this Direct Debit arrangement is governed by the terms of the Lifeplan Direct Debit Client Agreement as set out on the back of this request

Signature of investor Date

Signature of investor Date

Please sign below if account holders are different to policy owners (If joint account all signatures required).

Signature of Account Holder Date

Signature of Account Holder Date

Please read the Client Service Agreement overleaf and ensure that you retain a copy.



For enquiries please call 1300 1300 385

Lifeplan Funds management is a business name of
Lifeplan Australia Friendly Society Ltd. ABN 78 087 649 492. AFSL 237989
Lifeplan Australia Friendly Society Ltd. User ID No - 026445
Lifeplan Australia Friendly Society Ltd. User ID No - 012010
111 Gawler place, Adelaide SA 5000 Tel (08) 8212 3838