

Lifepan FlexiGrowth Investment Withdrawal Form



Please PRINT clearly in Black pen keeping well within the boxes.
 Start at the left, write one letter in each box and leave one box between words.
 Use crosses in the boxes marked with an 'X'.

A. INVESTOR(S) DETAILS

Last name																																				
First name																																				
Address																																				
Suburb																																				
State							Postcode																													
Phone Number													Mobile Phone																							

B. INVESTMENT DETAILS

Policy Number							Start Date	DDMMYYYY					
FULL Withdrawal	<input checked="" type="checkbox"/>						(Interim rate of interest will apply if an investment option is fully withdrawn prior to Performance Declarations).						
Partial Withdrawal minimum amount \$500	<input checked="" type="checkbox"/>						Amount required \$						
Please withdraw from my current investment fund proportions	<input checked="" type="checkbox"/>												



OR INVESTMENT OPTION SELECTION

Capital Guaranteed Option	\$ or %												
Income Option	\$ or %												
Cash Enhanced Option	\$ or %												
High Yield Option	\$ or %												
Total	\$ or %												
Total % must equal 100%													

C. FINANCIAL INSTITUTION ACCOUNT DETAILS

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

Please complete and sign overleaf.





D. TO BETTER UNDERSTAND CUSTOMERS' NEEDS, PLEASE INDICATE YOUR REASONS FOR WITHDRAWAL

Purchase Property/Purchased Car	<input checked="" type="checkbox"/>	Purchased other	<input checked="" type="checkbox"/>	Payment of a debt	<input checked="" type="checkbox"/>
Investment has reached maturity	<input checked="" type="checkbox"/>	Income support/ Living expenses	<input checked="" type="checkbox"/>		
Invest elsewhere - please specify	<input checked="" type="checkbox"/>				

E.NOTES

- Minimum remaining balance \$1,000 to keep investment open .
- Withdrawals from the High Yield Option require 25 business days notice.
- Direct Bank Credit funds cleared immediately after they have been credited to your nominated account.
- Cheques are available on request – please contact Lifeplan for further information.
- For security reasons no 3rd party bank credits will be issued.

F. SIGNATURE(S)

Signature of investor 1

Signature of investor 2

Name of investor 1

Name of investor 2

Date

Date

111 Gawler Place. Adelaide SA 5000 Tel (08) 8212 3838 Fax (08) 8212 2790
Lifeplan Funds Management is a business name of Lifeplan Australia Friendly Society Ltd.
ABN 78 087 649 492 AFSL 237989

