

# Lifeplan Investments Switch Request Form



(For existing Flexishield, TaxSmart investments, Community Bond and Wealth Builder customers)

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

Title	<input type="text"/>	Last name	<input type="text"/>
First name	<input type="text"/>		
Address	<input type="text"/>		
Suburb	<input type="text"/>		
State	<input type="text"/>	Postcode	<input type="text"/>
Phone number	<input type="text"/>	Mobile Phone	<input type="text"/>

## B. ALTERATION REQUEST

Policy Number

### Switch from:

- |   |  |   |
|---|--|---|
| <input checked="" type="checkbox"/> Flexishield               | <input checked="" type="checkbox"/> Community Bond             | <input checked="" type="checkbox"/> Wealth Builder Cash |
| <input checked="" type="checkbox"/> Wealth Builder Australian | <input checked="" type="checkbox"/> TaxSmart Cash Enhanced     | <input checked="" type="checkbox"/> TaxSmart High Yield |
| <input checked="" type="checkbox"/> TaxSmart Growth           | <input checked="" type="checkbox"/> TaxSmart Australian Shares |   |

Please switch  % or \$

### Switch into:

#### NextGen Investments

Option Number	Switch Details
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<input type="text"/>	<input type="text"/> % \$ <input type="text"/>
<b>TOTAL</b>	<input type="text"/> % \$ <input type="text"/>

Total % must equal 100%

## C. DECLARATION

I/We confirm that I/we have a copy of the current Lifeplan NextGen Investments Product Disclosure Statement Part 1 and Part 2 and that I/we have read and understood the Terms and Conditions overleaf.

I understand, from date of acceptance of this form by Lifeplan, my investment funds will be switched as per my instructions above.

Signature of Investor 1  Date

Signature of Investor 2  Date

## Terms and Conditions

- Details of the investment options can be found in the current Lifeplan NextGen Investments Product Disclosure Statement (PDS) available from Lifeplan by calling 1300 1300 38 or [lifeplan.com.au](http://lifeplan.com.au).
- You will still retain your original policy number and start date after a switch out of funds is processed to retain your length of membership to benefit from the advantages of a tax paid investment.
- A 125% additional investment can be added to your existing investment or to a new investment option. The original start date of your investment will still be applicable unless you exceed your 125% limit. If this is the case, you will be offered the option of opening a new investment account, a refund of the excess amount or the option to restart your tax paid start date
- Any amounts switched to the Lifeplan NextGen investment options will be subject to the fees and charges applicable to the product, other than stamp duty, which will not apply to any amounts switched to the investment options. See the PDS for details of the fees and charges and of how they may change. There is no change to the fees and charges applicable to your current investment.
- The Wealth Builder, Community Bond, TaxSmart Investments and Flexishield Funds are closed to new investments other than the additional deposits made under the 125% rule. If you choose to switch your funds from these products to the Lifeplan NextGen investment options, you will be unable to switch any of the funds back into your original investment. Please note investments in the Lifeplan NextGen investment options can be switched between those options. (See PDS for details and conditions relating to switching)
- The Lifeplan NextGen investment options offer varying degrees of investment risk and you should consider the information about investment risk in the PDS to determine if these investment options suits your needs.
- I/we acknowledge that neither Lifeplan, nor any other person, guarantees any particular rate of return from an option and nor do they guarantee the repayment of my/our investment in NextGen, with the exception of my/our investment in the Lifeplan Capital Guaranteed option (if applicable) which is solely guaranteed by Lifeplan.
- If you have more than one existing Flexishield, Community Bond, Lifeplan TaxSmart or Wealth Builder investment they will remain as separate investments with separate start dates even if you switch them into the same Lifeplan NextGen investment option.
- Any existing nominations of a Life Insured or a Beneficiary remain valid.
- The Lifeplan NextGen Investments is a separate benefit fund with its own Fund Rules. The existing Flexishield Bond Fund, Community Bond Fund, Lifeplan TaxSmart Investments and Wealth Builder Fund Rules have been amended to provide members of those Funds with the ability to switch to (but not from) the Lifeplan NextGen Investments products. Please contact Lifeplan if you would like a copy of the Fund Rules.
- A minimum switch of \$500 per investment option applies. Money is withdrawn from one option and invested in the other option effective the same business day. Switching may incur investing transaction costs. Refer to the NextGen Product Disclosure Statement.
- Bonus amounts for the financial year period applicable will be allocated at the interim rate if 100% of Community Bond, Flexishield or TaxSmart Cash Enhanced, TaxSmart High Yield and Wealth Builder Cash is switched into a Lifeplan NextGen investment option. Please contact Lifeplan Customer Services on 1300 1300 38 for further details or the interim rate applicable.