

Lifeplan NextGen Investments

Additional Deposit Option Form



Please phone the Customer Service Team on 1300 133 285 if you have any questions.
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".

Step 1 Your Details

Surname

First Name(s)

Address

Suburb

State Postcode

Phone

Step 2 Investment Details

Investment Number Total Deposit Amount \$

I will be paying my investments by:

- BPAY® – Biller Code 899138 – for details of your Customer Reference number, please call our Customer Service Team on 1300 133 285 or refer to your Investment Statement issued half yearly.
- DIRECT DEBIT – please complete Step Three confirming the frequency of the Direct Debit and also your financial institution account details at Step Four.
- CHEQUE – please make the cheque payable to "Lifeplan Australia Friendly Society Limited, <investor name>" and cross it "Not Negotiable".

Step 3 Direct Debit Details

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 \$100 per month.

Option 1 - Once Only

Once Only Amount \$ Collection Date for Direct Debit

OR Option 2 - Regular Ongoing Savings Plan (continues indefinitely until otherwise advised in writing by the policy owners)

Regular Savings – please indicate frequency below Amount \$

Weekly Fortnightly Month Quarter Start Date for Direct Debit

OR Option 3 - Instalment Investment Plan (active only for the period defined below)

Instalment Investment Plan

I want to invest a total amount of \$

as a series of regular debts of \$

Weekly Fortnightly Month Quarter Starting on

Note: This acts as a standing instruction to make additional deposits to your Lifeplan investment via direct debiting the nominated financial institution account until the series debts equals the total amount.

Step 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 Lifeplan Customer Service on 1300 133 285.
- I/We acknowledge that this authority will remain in force until Lifeplan receives written notice to cancel/alter this authority.

Direct Debit Authority

Signature of Account Owner 1

Signature of Account Owner 2

Step 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.

Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
Option Code	<input type="text"/>	\$	<input type="text"/>	.	<input type="text"/>	or	<input type="text"/>	%
	TOTAL	\$	<input type="text"/>	.	<input type="text"/>	or	100	%

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

Step 6 Declaration and Signature

- 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 Lifeplan Direct Debit Client Service Agreement that is available on request from Lifeplan.

Investor 1

Date

Investor 2

Date

Lifeplan Funds Management is a business name of Lifeplan Australia Friendly Society Ltd. ABN 78 087 649 492 AFSL 237989 Issued by

Return by Fax to: Fax us the completed form on (08) 8212 2790

Return by Post to: Lifeplan Funds Management Reply Paid 89 Adelaide SA 5001

