Lifeplan NextGen Investments Direct Debit Form

LPNGI-DDR01-001

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 Mobile Phone

Step 2 Investment Details

Investment Number Start Date DDMMYYYY

Investment Option Selection

Amount $.

X Week X Fortnight X Month X Quarter

Option Code

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Option Code

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Notes
Details of the current options are available in the Product Disclosure Statement or online at lifeplan.com.au
If no option is selected current investment option will apply. At least 3 business days notice is required.

Step 3 Financial Institution Account Details

Bank Name Branch

Branch Number (BSB) Account Number

Account Name

Step 4 Declaration and Signature

- I/We confirm that I/We have a copy of the current Product Disclosure Statement and that I/We have read, understood and retained for future reference.
- I/We acknowledge that I have read the Client Service Agreement and that I have retained a copy for future reference.

Investor 1 Date DDMMYYYY

Investor 2 Date DDMMYYYY

Issued by
Lifeplan FUNDS MANAGEMENT

Lifeplan Funds management is a business name of Lifeplan Australia Friendly Society Ltd.
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