

# Lifepan NextGen Investments

## Withdrawal Request 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  Please withdraw funds  from my current options Funds Specified in Step 4

### Step 3 Type of Withdrawal

Full Withdrawal (interim bonus rate will apply to the Capital Guaranteed Option for full withdrawals)

Partial Withdrawal - (Minimum Amount \$500) Amount Required \$

### Step 4 Specific Investment Option Withdrawal Details (see PDS for option details)

Option Code

\$  or  %

\$  or  %

\$  or  %

\$  or  %

\$  or  %

### Step 5 Financial Institution Account Details

Bank Name  Branch

Branch Number (BSB)  Account Number

Account Name

### Step 6 To better understand our investors' needs, please indicate reason for withdrawal below:

Purchase Property  Purchase Car  Purchase Other  Pay off a debt  Invest Elsewhere

### Step 7 Declaration and Signature

In consideration of payment of the value of that part of my investments listed above, I hereby waive all rights to further claims on Lifepan Funds Management under the above Investments for that part of the benefit so withdrawn.

Investor 1  Date

Investor 2  Date

Note: If under 16 years of age - both parents or guardians to sign and identification is required. • Payment will be distributed 5 days from the date request received. • Direct Bank Credit funds cleared immediately after they have been credited to your nominated account. • Cheques are available on request, please contact Lifepan for further information. • For security reasons no 3rd party bank credits or cheques will be processed.

Issued by



Lifepan Funds Management is a business name of Lifepan Australia Friendly Society Ltd.  
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