

# Lifeplan TaxSmart Investments Regular Withdrawal Option



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	D D M M Y Y Y Y					
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### INVESTMENT OPTION SELECTION

Total Amount \$							Frequency	<input checked="" type="checkbox"/> (Monthly)	<input checked="" type="checkbox"/> (Quarterly)	<input checked="" type="checkbox"/> (Annually)
Cash Enhanced Option	\$									
High Yield Option	\$									
Growth Option	\$									
Australian Shares Option	\$									

## C. FINANCIAL INSTITUTION ACCOUNT DETAILS

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

## D. NOTES

- A minimum withdrawal amount of \$100 monthly will be paid to your nominated Australian financial institution.
- Funds are withdrawn on the first business day after the payment period selection.
- A minimum investment balance of \$15,000 must be maintained.

## E. DECLARATION

I/We confirm that I/we have a copy of the current Product Disclosure Statement and that I/we have read, understood and retained this for future reference.

Signature of Investor 1

Date

D D M M Y Y Y Y

Signature of Investor 2

Date

D D M M Y Y Y Y