

Lifeplan TaxSmart Investments Switch Request Form



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

Investment Options	Existing Details (% or \$)		New Details (% or \$)	
Cash Enhanced Option	<input type="text"/>	% \$ <input type="text"/>	<input type="text"/>	% \$ <input type="text"/>
High Yield Option	<input type="text"/>	% \$ <input type="text"/>	<input type="text"/>	% \$ <input type="text"/>
Growth Option	<input type="text"/>	% \$ <input type="text"/>	<input type="text"/>	% \$ <input type="text"/>
Australian Shares Option	<input type="text"/>	% \$ <input type="text"/>	<input type="text"/>	% \$ <input type="text"/>
Total	<input type="text"/>	% \$ <input type="text"/>	<input type="text"/>	% \$ <input type="text"/>

Total % must equal 100%.

C. NOTES

- The minimum switch is \$500 per Investment Option.
- A maximum of 12 switches are permitted in any rolling 12 month period commencing on your start date.
- Switches from the High Yield Option require 25 business days notice.

D. 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.

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

Signature of Investor 2

Date

Date