

# Lifeplan TaxSmart Investments Withdrawal 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

Last name

First name

Address

Suburb

State  Postcode

Phone number  Mobile Phone

## B. INVESTMENT DETAILS

Policy Number

Please choose one of the following: (Interim rate of interest will apply if an interest paying investment option if fully withdrawn prior to performance declarations).

Full Withdrawal

Partial Withdrawal minimum amount \$500  Amount required \$

Please withdraw from my current investment fund proportions

## OR INVESTMENT OPTION SELECTION

Cash Enhanced Option \$ or %

High Yield Option \$ or %

Growth Option \$ or %

Australian Shares Option \$ or %

Total \$ or %

Total % must equal 100%

## C. FINANCIAL INSTITUTION ACCOUNT DETAILS

Bank Name

Address

Account Name

Branch Number (BSB)  Account Number

Please complete and sign overleaf.

