Lifeplan Tax Minimiser Investment Bond 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 X

Funds Specified in Step 4 X

Step 3 Type of Withdrawal

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

X Partial Withdrawal - (Minimum Amount $500) Amount Required $.

X Regular Withdrawal - (Minimum Amount $100) Amount Required $.

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

Investment Fund Selection

Multi-Manager Australian Shares	$.	or %	.
Multi-Manager Conservative Fund	$.	or %	.
Multi-Manager Moderate Fund	$.	or %	.
Multi-Manager Growth Fund	$.	or %	.
Multi-Manager Global Share Fund	$.	or %	.
Capital Guaranteed Fund	$.	or %	.
Capital Secure Fund	$.	or %	.
Property Securities Fund	$.	or %	.
Australian Shares Fund	$.	or %	.
Global Shares Fund	$.	or %	.
Managed Investment Fund	$.	or %	.
Growth Investment Fund	$.	or %	.
High Growth Fund	$.	or %	.
Enhanced Yield Fund	$.	or %	.

(Please see reverse side for further details)

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:

- Living expenses
- Pay off debts
- Invest elsewhere
- Purchase property
- Invest in superannuation
- Purchase car

Other

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all rights to further claims on Lifeplan Funds Management under the above investments for that part of the benefit so withdrawn.**

Investor 1 | Date DDMMYYYY

Investor 2 | Date DDMMYYYY

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 Lifeplan for further information. • For security reasons no 3rd party bank credits or cheques will be processed.

Issued by

Lifeplan
FUNDS MANAGEMENT

Lifeplan Funds Management is a business name of
Lifeplan Australia Friendly Society Ltd.
ABN 78 087 649 492 AFSL 237989

Fax us the completed form on (08) 8212 2790

Return by Post to:
Lifeplan Funds Management
Reply Paid 89
Adelaide SA 5001