# TAX MINIMISER INVESTMENT SWITCH REQUEST

Office Use Only:
Received Date

## 1. Investor Details:

Title
Surname
Given Names
Address
Suburb
State
Postcode
Date of Birth
Contact Phone

## 2. Alteration Request

Policy Number

| Investment Fund | Existing Details (% or $) | | New Details (% or $) | |
|---|---|---|---|---|
| Multi-Manager Australian Shares Fund | % | $ | % | $ |
| Multi-Manager Conservative Fund | % | $ | % | $ |
| Multi-Manager Moderate Fund | % | $ | % | $ |
| Multi-Manager Growth Fund | % | $ | % | $ |
| Multi-Manager Global Share Fund | % | $ | % | $ |
| Capital Guaranteed Fund | % | $ | % | $ |
| Capital Secure Fund | % | $ | % | $ |
| Property Securities Fund | % | $ | % | $ |
| Australian Shares Fund | % | $ | % | $ |
| Global Shares Fund | % | $ | % | $ |
| Managed Investment Fund | % | $ | % | $ |
| Growth Investment Fund | % | $ | % | $ |
| High Growth Fund | % | $ | % | $ |
| Enhanced Yield Fund | % | $ | % | $ |
| Total | | | Total | |

## 3. Notes

*The minimum switch is $500 per Investment Fund.
*A maximum of 12 switches are permitted in any rolling 12-month period commencing on your start date.
*Transaction Costs as disclosed in the current Product Disclosure Statement will apply to your switch request, if applicable.

## 4. 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 further 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 | Date

Co-Investor (if applicable) | Date

Lifeplan FUNDS MANAGEMENT

**Customer Service:**
**Phone: 1300 133 285**
Fax: (08) 8212 2790
Email: enquiries@lifeplan.com.au

Please return your completed form to:
Lifeplan Funds Management
Reply Paid 89
Adelaide SA 5001