

Withdrawal form



Guide to completing this form

- Use this form to make a full or partial withdrawal from your LifeBuilder or ChildBuilder investment.
- Please use BLUE/BLACK ink and complete the applicable sections in BLOCK LETTERS.

Section 1 Investor details

1.1 Investor details

Bond number

Client number (if known)

Title

Given name(s)

Surname

Date of birth

D	D	/	M	M	/	Y	Y	Y	Y
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Section 2 Withdrawal instructions

2.1 Withdrawal amount

Please select one only.

Full withdrawal
Please proceed to section 4.

Partial withdrawal of

\$

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If selecting partial withdrawal please complete all sections of this form.

Please note: The minimum partial withdrawal amount is \$500.

Section 3

Partial withdrawal

3.1 Partial withdrawal instructions

Pro-rata - Please withdraw from the same investment options and in the same proportions that I/we are currently invested in.

Please make the withdrawal according to the specific investment allocations below.

Select whether to allocate in % or \$

%

\$

Please note: A minimum balance of \$500 must be maintained in each investment option.

A minimum total balance of \$1,000 must remain in your account.

Please attach extra copies of this page if you need to provide more investment options than the space provided.

Option code	Option name	Amount to be withdrawn
Total amount (% or \$)		

Total dollar (\$) amount must equal the amount requested in Section 2.

Total percentage (%) amount must equal 100%.

Section 4

Financial institution details

4.1 Please provide your Australian financial institution information

Branch name

Account name

BSB number

Account number

The account name with the above financial institution must be the same as the account name of the investment bond.

Withdrawals cannot be paid to third parties.

Section 5

Declaration and signatures

5.1 Declaration and signatures

If this form is signed under Power of Attorney the attorney certifies that he/she has not received notice of revocation of that power.

If your power of attorney has not previously been registered by us, we will require a certified copy of the power of attorney document as well as the appropriate proof of identification documents in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF Law).

For more information, please refer to the 'Completing proof of identity' document on our website.

I/We declare that all details in this form are true and correct.

I/We authorise Generation Life Limited to process the instructions set out in this form.

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

I/We declare that I/we may be required to provide additional proof of identification information for the purposes of AML/CTF Law.

Investor 1

Full name (please print)

Signature

Date

Please select the appropriate box

Individual

Trustee

Director

Power of attorney

Investor 2

Full name (please print)

Signature

Date

Please select the appropriate box

Individual

Trustee

Director

Power of attorney



Outthinking today.

Return completed form by post to:

GPO Box 263
Collins Street West
Melbourne VIC 8007

Enquiries

Investor services

1800 806 362

Adviser services

1800 333 657

Investment Bonds

LifeBuilder | ChildBuilder | FuneralBond

Generation Life is an Australian leader in investment bonds. We pride ourselves in providing an extensive investment menu with choice and quality for our investors.

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