

# Additional Investment via Direct Debit form

(includes progressive investing facility)



## Guide to completing this form

- This form is to be completed by investors who want to make an additional investment via direct debit.
- This form is to be completed by investors who want to set up a progressive investing facility.
- The minimum additional investment amount is \$500 per investment option. Please ensure the minimum amount requirement is met.
- Please use BLACK/BLUE 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 |
|---|---|---|---|---|---|---|---|---|---|

# Section 2

## Investment details

### 2.1 Additional amount to be invested

Additional one-off investment amount

\$

### 2.2 Investment allocation

Please allocate my investment according to my existing Default Investment Allocation.

**Please proceed to Section 3.**

OR

Please progressively invest my investment according to my progressive investing amount provided in Section 5 (only available for investment amounts of \$25,000 or more).

OR

Please allocate my investment according to the specific investment allocations below (refer to the 'Generation Life Investment Menu' document on our website for investment option codes).

Select whether to allocate in % or \$

%

\$

**Please note:** The minimum allocation for each investment option is \$500.

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 invested |
|-------------------------------|-------------|-----------------------|
|                               |             |                       |
|                               |             |                       |
|                               |             |                       |
|                               |             |                       |
|                               |             |                       |
|                               |             |                       |
|                               |             |                       |
| <b>Total amount (% or \$)</b> |             |                       |

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

Total percentage (%) amount must equal 100%.

By providing a specific investment allocation for this investment, your Default Investment Allocation will not be updated automatically.

**Please tick this box if you want your Default Investment Allocation to be updated according to the specific investment allocation provided above.**

I/we understand, that by ticking this box, I/we acknowledge and accept that my Default Investment Allocation will be updated to reflect the investment allocation I/we provided above.

**Please note:** By updating your Default Investment Allocation, your existing Regular Savings Plan and progressive investing facility allocation instructions (if applicable) will be updated to reflect the updated Default Investment Allocation.

# Section 3

## Direct debit details

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**3.1 Your Australian financial institution information**

**Branch name**

**Account name**

**BSB number**

 

**Account number**

I/We request Generation Life Limited (Direct Debit User ID 263858) to arrange for funds to be debited from my/our account as described in this form. I/We have read and understood the terms and conditions of the Direct Debit Service Agreement contained in the current Product Disclosure Statement and agree to them.

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

**3.2 Direct debit authorisation**

Account holder 1 signature

Date

 /  / 

Account holder 2 signature

Date

 /  /

## Section 4

### Identification information

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#### 4.1 Please select the origin and source of funds being invested

To comply with Anti-Money Laundering and Counter-Terrorism Financing Act 2006, we require you to disclose whether you (or any key beneficial owners are) or you have an association with, a politically exposed person.

Anti-Money Laundering and Counter-Terrorism Financing Act 2006 require that we collect this information. Your application cannot be processed without this information.

#### Are you a Politically Exposed Person?

Yes

No

#### Please select the origin and source of funds being invested

Income from regular employment

Investments

Business income

Windfall (e.g. gift or lottery winning)

Sale of assets

Borrowed funds

Other  
(please specify)

## Section 5

### Progressive investing facility (optional)

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For investment amounts of \$25,000 or more, you can elect to have your investment amount progressively invested on a monthly basis according to your Default Investment Allocation. Your investment will initially be invested in the cash investment option (Macquarie Treasury Fund).

Progressively invest

(per month)

The progressive investment facility is subject to the terms and conditions contained in the Product Disclosure Statement.

**Please note:** Progressive investing can only be for a maximum of 12 payments.

# Section 6

## Declaration and signatures

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### 6.1 Declaration

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. Please allocate my investment according to my Default Investment Allocation.

**Please tick this box if you authorise us to process this additional investment in the event that processing this will exceed the 125% limit.**

I/we understand, that by ticking this box, I/we acknowledge and accept that the start date of my/our 10-year period will be reset to the start of the investment year in which the excess additional investment is processed.

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### 6.2 Investor 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.

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

#### Investor 1

Full name (please print)

Signature

Date

  /   /    

Please select appropriate box

Individual

Director

Trustee

Power of attorney

#### Investor 2

Full name (please print)

Signature

Date

  /   /    

Please select appropriate box

Individual

Director

Trustee

Power of attorney



Outthinking today.

## Contact details

### Postal address

GPO Box 263  
Collins Street West  
Melbourne VIC 8007

### Email

**Enquiries**  
enquiry@genlife.com.au

### Form lodgements

forms@genlife.com.au

### 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.

[genlife.com.au](http://genlife.com.au)

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