

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	<input type="text"/>	Client number (if known)	<input type="text"/>
	Title	<input type="text"/>		
	Given name(s)	<input type="text"/>	Surname	<input type="text"/>
	Date of birth	<input type="text"/>		
		<input type="text"/>		

Section 2

Investment details

2.1 Additional amount to be invested	Additional one-off investment amount	\$ <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
	Do you want to proceed with this additional investment if it will exceed the 125% limit? (LifeBuilder and ChildBuilder only)	
	<input type="checkbox"/>	Yes, 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.
	<input type="checkbox"/>	No, do not proceed if it will exceed the 125% limit.

2.2 Investment allocation

Please allocate my investment according to my existing Default Investment Allocation.
Please ensure you also complete Sections 4, 5 and 6 of this form.

Please select one only.

OR

Please progressively invest my investment according to my progressive investing instruction provided in Section 3 (only available for investment amounts of \$25,000 or more).
Please ensure you also complete Sections 3, 4, 5 and 6 of this form.

OR

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

Do you want to update your Default Investment Allocation according to the instructions provided below?

No, do not update my Default Investment Allocation. *(Default option if a selection is not made)*

Yes, update my Default Investment Allocation.

Please note: If you choose to update 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.

The new Default Investment Allocation will be used to invest all future contributions you make to your investment bond and does not impact your existing portfolio.

Please ensure you also complete Sections 4, 5 and 6 of this form.

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.

Fund code	Fund name	Amount to be invested
Total amount (% or \$)		

Total dollar (\$) amount must equal the amount invested in Section 2.1.

Total percentage (%) amount must equal 100%.

Section 3

Progressive investing facility (optional)

3.1 Progressive investing facility

For investment amounts of \$25,000 or more, you can elect to have your investment amount progressively invested on a monthly basis (up to a maximum of 12 payments) according to your Default Investment Allocation. Your investment will initially be invested in the cash investment option (Macquarie Treasury Fund).

Please provide the number of payments below if you want to progressively invest your additional investment.

Invest according to my Default Investment Allocation in equal payments (maximum of 12 payments)

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

The first payment will occur when this additional investment via direct debit request is finalised and second and subsequent payments will normally occur on the 24th of each following month or the next Melbourne business day.

Important note: If the annual auto-rebalancing facility is selected in your investment portfolio, the annual auto-rebalancing will not occur while a current active progressive investing facility is in place.

Important note: The progressive investing facility will invest according to your Default Investment Allocation. Please also complete the Default Investment Allocation form available on our website if you would like to establish or update your Default Investment Allocation.

Section 4

Identification information

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 have an association with a politically exposed person.

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

Are you a Politically Exposed Person or are you associated with 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

Direct debit details

5.1 Your Australian financial institution information

Bank and 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 for the above financial institution must be the same as the account name of the investment bond.

5.2 Direct debit authorisation

Account holder 1 signature

Date

 / /

Account holder 2 signature

Date

 / /

Section 6

Declaration and signatures

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 received a copy of the current Product Disclosure Statement (PDS) and have read and understood the PDS and agree to be bound by the terms and conditions set out in the PDS.

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.

Form submission

Email

enquiry@genlife.com.au

Postal address

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

Australia's number one Investment Bond provider.

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