

# 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.

OR

Please make the withdrawal according to the specific instructions below.

Select whether to withdraw in % or \$

%

\$

Please refer to the 'Generation Life Investment Menu' document on our website for fund codes.

**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 after your withdrawal, otherwise your investment bond may be closed and the remaining funds returned to you.

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Fund code	Fund name	Amount to be withdrawn
<b>Total amount (% or \$)</b>		

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 for the withdrawal payment

**Bank and branch name**

**Account name**

**BSB number**

     

**Account number**

         

**Important note:** The account name for 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 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.

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

D	D	/	M	M	/	Y	Y	Y	Y
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Please select the appropriate box

Individual

Trustee

Director

Power of attorney

#### Investor 2

Full name (please print)

Signature

Date

D	D	/	M	M	/	Y	Y	Y	Y
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Please select the appropriate box

Individual

Trustee

Director

Power of attorney



Outthinking today.

#### Form submission

##### 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.

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