



Savings Plan Form

This form is to be used to set up a Savings Plan or make changes to an existing Savings Plan.

Section 1 – Bond details

Client number(s):	CL5	Bond number:	EB
	CL5		
Bond Owner(s):			
Email:			
Phone:			

Section 2 – Savings Plan details

I/We would like to:

- | | |
|--|---|
| ☐ establish a new Savings Plan | ► Please complete the entire form. |
| ☐ change an existing Savings Plan | ► Please complete the entire form. |
| ☐ cancel an existing Savings Plan (The Education Bond needs to have reached its Paid-Up Status in order to cancel an existing Savings Plan) | ► Please complete Section 4. |

If you are establishing a new or changing an existing Savings Plan, please complete the information below.

The total annual minimum Savings Plan contribution for monthly, quarterly, half-yearly and yearly frequency is \$2,400. For example, a minimum of \$200 per month or \$600 per quarter. The minimum fortnightly frequency Savings Plan contribution is \$100.

Savings Plan contributions will be invested according to the Default Investment Allocation on your bond. The Default Investment Allocation can be viewed online by logging in to the investor portal and can be updated any time by providing us instructions in writing.

Savings Plan Contribution:	Savings Plan frequency: (please tick)
\$	☐ Fortnightly ☐ Monthly ☐ Quarterly
	☐ Half-yearly ☐ Yearly

You are also able to specify below the rate at which your Savings Plan contribution will increase on each anniversary of your bond's Commencement Date.

Savings escalation feature – annual increase: % 0-25% per annum

First Savings Plan direct debit date: /

If you have selected monthly, quarterly, half-yearly or yearly frequency, the first Savings Plan direct debit date can only be scheduled on the 1st to the 28th of the month. If you have selected fortnightly frequency, the first Savings Plan direct debit date can only fall on Melbourne Business Days.

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The first direct debit for your Savings Plan will be made on the date provided above, or the next Melbourne Business Day if the date falls on a weekend or public holiday. If a first Savings Plan direct debit date is not provided then the first Savings Plan direct debit date will be the day the application is received and processed by Futurity Investment Group Limited (Futurity).

For monthly, quarterly, half-yearly and yearly frequency, if the first Savings Plan direct debit date provided is before the application is received and processed by Futurity, then the first Savings Plan direct debit date will be on the next month of the provided day above, or the next Melbourne Business Day if the date falls on a weekend or public holiday.

For fortnightly frequency, if the first Savings Plan direct debit date provided is before the application is received and processed by Futurity, then the first Savings Plan direct debit date will be on the next valid fortnightly date, or the next Melbourne Business Day if the date falls on a public holiday.

The unit price applied to Savings Plan direct debit contributions is determined by the date the direct debit clears, not the date funds are debited from your bank account.

Section 3 – Direct Debit Request

If you are establishing or changing your Savings Plan, please complete the information below.

Direct Debit Authorisation and Request

Account details

BSB number:		Account number:	
Name of financial institution:			
Account name:			

Note: If debiting from a joint account, both names must be listed above and both parties must sign this form below.

Direct Debit Authority

I/We:

- request and authorise Futurity Investment Group Limited, user ID 609767, to arrange for funds to be debited from my/our account as described above and throughout the Application Form through the Bulk Electronic Clearing System (BECS); and
- have read and understood the terms and conditions of the Direct Debit Request Service Agreement contained in the combined Financial Services Guide and Product Disclosure Statement and agree to them.

I/We, the applicant(s) whose signature(s) appears below, confirm that I am/we are the account holder(s) or authorised signatory(s) of the Australian financial institution account provided in this form.

Authorised Australian Financial Institution Account Signatory 1

Signature:	
Print name:	
Date:	/ /

Authorised Australian Financial Institution Account Signatory 2

Signature:	
Print name:	
Date:	/ /

Section 4 – Declaration and signature

I/We confirm that, to the best of my/our knowledge, the information provided on this form is true and correct.

I/We authorise Futurity Investment Group Limited to act on and process the instructions set out in this form.

I/We confirm that I/we have obtained a copy of the current combined Financial Services Guide and Product Disclosure Statement, have read and understood it and agree to be bound by the terms and conditions contained within the document.

Authorised signatory 1

Signature:	
Print name:	
Capacity:	
Date:	/ /

Authorised signatory 2

Signature:	
Print name:	
Capacity:	
Date:	/ /

To submit your completed form, please log into your portal and use the document upload function to securely share this document with us.

Futurity Investment Group Limited

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