FUTURITY

Appointing or Removing Bond Guardians Form

This form is for appointing (or removing) Bond Guardians to act on behalf of the last surviving Bond Owner should they die or become legally, physically or mentally incapacitated. You can give Bond Guardians your chosen level of authority to act in respect of your bond. Please note that up to three Bond Guardians can be appointed and they must be at least 18 years of age. Additional identification verification will be required in line with Anti-Money Laundering and Counter-Terrorism Financing Laws (AML/CTF Laws) as and when appropriate. If you are appointing or removing more than two Bond Guardians, please contact us. For Bond Guardian terms and conditions, please refer to the current Product Disclosure Statement available at futurityinvest.com.au

Section 1 – Bond Details

Client number(s): CL5 Bond number:

CL5

Bond Owner(s):

Email:

Phone:

Section 2 – Appointment or removal of Bond Guardians with basic Authorised Functions

Appointment of Bond Guardian

☐ I/We would like to appoint this person(s) as my/our Bond Guardian(s) and I/we authorise my/our Bond Guardian(s) to have these basic Authorised Functions:

- access to my/our online portal, bond details and personal details and to be entitled to receive reports and statements; and
- any other basic Authorised Functions that Futurity Investment Group Limited (Futurity) may, from time to time, approve.

Removal of Bond Guardian

☐ I/We would like to remove the person(s) named below as my/our Bond Guardian(s).
(Note: Only the name of the Bond Guardian(s) being removed is required).

Bond Guardian 1

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / /

Residential address:
(not a PO Box)

Phone:

Email:

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Bond Guardian 2

Title: (please tick) ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other: (please specify)

First name: Middle name:

Surname:

Date of birth: / /

Residential address: (not a PO Box)

Phone:

Email:

Authority to give us instructions for joint Bond Guardians

Please elect which joint Bond Guardians have authority to instruct us on your bond.

☐ Any Bond Guardian ☐ All Bond Guardians

☐ Only Bond Guardian 1 ☐ Only Bond Guardian 2

Section 3 – Additional Authorised Functions (optional)

☐ I/We authorise my/our Bond Guardian(s) to have the below additional Authorised Functions including:

- switching Investment Options;
- making contributions and withdrawals including making full withdrawals (with Futurity's approval); and
- for Futurity Education Bonds only, making Education Benefit Claims, and appointing, removing and replacing Education Beneficiaries.

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.

Bond Owner / Director / Trustee 1

Signature:

Print name:

Date: / /

Bond Owner / Director / Trustee 2

Signature:

Print name:

Date: / /

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

Futurity Investment Group Limited

Level 15, 333 Collins Street
Melbourne VIC 3000
Phone: 1300 345 456

Email: investorcare@futurityinvest.com.au
Website: futurityinvest.com.au
ACN 087 648 879 | AFSL 236665

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