FUTURITY

Appointing or Removing Bond Representatives Form

This form is for appointing or removing Bond Representatives to act for you while you continue in your role as Bond Owner. You can give Bond Representatives your chosen level of authority to act in respect of your bond. Please note that up to three Bond Representatives can be appointed and they can only be appointed to a bond that is owned by a natural person, not a bond owned by a company or a trust. Bond Representatives must be aged at least 18 years of age. If you are appointing or removing more than two Bond Representatives, please contact us. For Bond Representative terms and conditions, please refer to the current Product Disclosure Statement (PDS) available at futurityinvest.com.au.

We are required to comply with Anti-Money Laundering and Counter-Terrorism Financing Laws, including the need to establish the identity of persons associated with the investment. To support this, we require details of a current driver's licence or passport of relevant individuals. If you are unable to provide details of a driver's licence or passport for the Bond Representative, please contact us on 1300 345 456 for a list of other eligible identification documents. We may, from time to time, require additional information to assist with this process.

Section 1 – Bond details

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

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

(please tick which instructions apply)

Appointment of Bond Representative

☐ I/We would like to appoint this person(s) as my/our Bond Representative(s). I/we authorise my/our Bond Representative(s) to have these basic 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 functions that Futurity Investment Group Limited (Futurity) may, from time to time, approve.

Removal of Bond Representative

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

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Bond Representative 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)

Occupation:

Phone:

Email:

Identification verification

Photo ID provided (please tick): ☐ Driver's Licence **OR** ☐ Passport

Is the Bond Representative a Politically Exposed Person? (refer to the PDS for the definition) (please tick): ☐ Yes ☐ No

If 'Yes' to the above question, please provide their source of wealth:

- ☐ Employment income
- ☐ Business ownership or business income
- ☐ Investment income or capital growth
- ☐ Sale of a business or major asset
- ☐ Inheritance
- ☐ Gift/Donation
- ☐ Compensation or insurance payout
- ☐ Superannuation/Pension

Other (please specify)

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) Laws, we are required to ask for additional tax residency information.

Are they a tax resident of Australia? ☐ Yes ☐ No

Are they a tax resident of a country other than Australia or a Specified U.S. Person? ☐ Yes ☐ No

If 'Yes' to the above question, they will need to complete a separate FATCA/CRS Form available on our website.

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Bond Representative 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)

Occupation:

Phone:

Email:

Identification verification

Photo ID provided (please tick): ☐ Driver's Licence **OR** ☐ Passport

Is the Bond Representative a Politically Exposed Person? (refer to the PDS for the definition) (please tick): ☐ Yes ☐ No

If 'Yes' to the above question, please provide their source of wealth:

- ☐ Employment income
- ☐ Business ownership or business income
- ☐ Investment income or capital growth
- ☐ Sale of a business or major asset
- ☐ Inheritance
- ☐ Gift/Donation
- ☐ Compensation or insurance payout
- ☐ Superannuation/Pension

Other (please specify)

Under the Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) Laws, we are required to ask for additional tax residency information.

Are they a tax resident of Australia? ☐ Yes ☐ No

Are they a tax resident of a country other than Australia or a Specified U.S. Person? ☐ Yes ☐ No

If 'Yes' to the above question, they will need to complete a separate FATCA/CRS Form available on our website.

Authority to give us instructions for joint Bond Representatives

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

- ☐ Any Bond Representative
- ☐ Only Bond Representative 1
- ☐ All Bond Representatives
- ☐ Only Bond Representative 2

Section 3 – Additional Authorised Functions (optional)

☐ I/We authorise my/our Bond Representative(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		**Bond Owner / Director / Trustee 2**	
Signature:		Signature:	
Print name:		Print name:	
Date:	/ /	Date:	/ /

Please provide a signature of the Bond Representative below to enable us to verify transaction requests.

Bond Representative signature 1		**Bond Representative signature 2**	
Signature:		Signature:	
Print name:		Print name:	
Date:	/ /	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

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