

Direct Debit Contribution and Dollar Cost Averaging Form

This form is to be used if you wish to make additional contributions to your bond including setting up a dollar cost averaging facility.

Section 1 – Bond details

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

Section 2 – Additional contribution details

The minimum additional contribution is \$500 per bond with a minimum of \$100 per Investment Option chosen.

Additional contribution amount:	\$
Additional contribution direct debit date:	/ / /

The direct debit 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 an additional contribution direct debit date is not provided or if the date provided is before this request is received and processed by Futurity, then the additional contribution direct debit date will be the day this request is received and processed by Futurity. The unit price applied to the additional contribution amount is determined by the date the direct debit clears, not the date funds are debited from your bank account.

Please select the allocation method for the additional contribution.

Select one only.

☐ Allocate the additional contribution according to the Default Investment Allocation on my bond.

▶ Please complete Sections 5 and 6.

OR

☐ Allocate the additional contribution to the specific investment allocation instruction provided in Section 3.

▶ Please complete Sections 3, 5 and 6.

OR

☐ Allocate the additional contribution progressively according to the dollar cost averaging instruction in Section 4. (Dollar cost averaging is only available for additional contributions of \$25,000 and above.)

▶ Please complete Sections 4, 5 and 6.

To allocate funds for this additional contribution differently to your existing Default Investment Allocation, indicate below where this contribution is to be invested. Please note the minimum investment amount per Investment Option is \$100.

(Default) No, do not update my Default Investment Allocation.

☐ Yes, update my Default Investment Allocation.

The updated Default Investment Allocation will be used to invest all future additional contributions and does not impact the existing Investment Option holdings in your bond.

Important: For percentage allocation, the total allocation must total 100%.

Please attach extra copies of this page if you need to provide more Investment Options than the space provided.

Section 4 – Dollar cost averaging instruction

Dollar cost averaging is available for additional contributions of \$25,000 or above, up to a maximum of 12 equal monthly dollar cost averaging switches.

The additional contribution will be initially invested in the bond's cash Investment Option (or another cash Investment Option as we determine from time to time) and progressively switched into your chosen Investment Options monthly according to your Default Investment Allocation, as at the time of each switch, over your selected number of monthly dollar cost averaging switches.

Please specify below the number of monthly dollar cost averaging switches to be made, if you want to dollar cost average your additional contribution according to your Default Investment Allocation.

Number of monthly dollar cost averaging switches: (maximum of 12 switches)

The first dollar cost averaging switch will be made in accordance with your additional contribution direct debit date.

The additional contribution direct debit date also sets the day of the month for each subsequent monthly dollar cost averaging switch, or the next Melbourne Business Day if the switch date falls on a weekend or public holiday.

Important: If you have selected to use the auto-reweight facility, commencing a dollar cost averaging facility will cancel and remove the auto-reweight facility from your bond. New auto-reweight facility instructions can be provided after the dollar cost averaging facility has ended. Refer to PDS Part A for further details.

Section 5 – Direct debit authorisation and request

Please provide your Australian financial institution information below.

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 6 – Declaration and signature

Your acknowledgements and declarations

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:

Capacity:

Date:

 / /

Bond Owner / Director / Trustee 2

Signature:

Print name:

Capacity:

Date:

 / /

* By completing this form as Bond Guardian/Bond Representative, you are acting in capacity as Bond Owner and confirm that you are authorised to do so.

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



FUTURITY