



Regular Withdrawal Plan Form

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

Important: There may be personal tax implications when making withdrawals. Please seek independent professional advice for your specific personal circumstances if you are unsure or require advice.

Section 1 – Bond details

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

Section 2 – Regular Withdrawal Plan details

I/We would like to:

- ☐ establish a new Regular Withdrawal Plan
- ☐ change an existing Regular Withdrawal Plan
- ☐ cancel an existing Regular Withdrawal Plan

▶ **Please complete the entire form.**

▶ **Please complete the entire form.**

▶ **Please complete Section 4.**

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

The minimum Regular Withdrawal Plan amount is \$500 per selected frequency.

Regular Withdrawal Plan amount:	Regular Withdrawal Plan frequency: (please tick)
\$	☐ Monthly ☐ Quarterly
	☐ Half-yearly ☐ Yearly

First Regular Withdrawal Plan transaction date: / /

The first Regular Withdrawal Plan transaction date can only be scheduled on the 1st to the 28th of the month.

The first withdrawal for your Regular Withdrawal 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 Regular Withdrawal Plan transaction is not provided then the first Regular Withdrawal Plan transaction date will be the day this instruction is received and processed by Futurity Investment Group Limited (Futurity).

If the first Regular Withdrawal Plan transaction date provided is before the form is received and processed by Futurity, then the first Regular Withdrawal Plan transaction date will be on the next valid date based on the frequency and first Regular Withdrawal Plan direct debit date provided above, or the next Melbourne business day if the date falls on a weekend or public holiday.

Please provide your Regular Withdrawal Plan instructions below.

Important: If there are insufficient funds in any Investment Option to meet a Regular Withdrawal Plan transaction, the allocated amount for that Investment Option will not be included in the Regular Withdrawal Plan transaction. This does not impact any other Investment Options in the Regular Withdrawal Plan instructions with sufficient funds which will continue to be paid according to the allocated amount.

Important: The total must equal the Regular Withdrawal Plan amount provided in Section 2.

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

If you are establishing or changing your Regular Withdrawal Plan, please complete the information below for the regular withdrawal payments.

* Must select one of the options.

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

Important: Please ensure all details are correct. An incorrect BSB or account number may result in your money being paid to the wrong account which could result in the loss of your funds.

Section 5 – 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:

Capacity:

Date:

 / /

Bond Owner / Director / Trustee 2

Signature:

Print name:

Capacity:

Date:

 / /

* By completing this form as Bond Guardian or 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

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