



Withdrawal Form

Please call us on 1300 345 456 if you need assistance completing this form.

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.

- Withdrawals will be processed proportionately across the Investment Option holdings on your bond.
- If you want to provide specific Investment Option(s) from which your partial withdrawal will be processed, please complete Section 3 of this form.
- Your bond is subject to an ongoing minimum balance of \$500 (and \$500 per Investment Option). A transaction that results in a balance below this minimum may be processed as a full withdrawal and the bond will be closed.
- Please check that there are sufficient funds available in your bond or in your selected specific Investment Options via your online portal or by contacting us prior to submitting the form.

Section 1 – Bond details

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

Section 2 – Withdrawal details

Please provide your withdrawal preference by selecting one of the below options.

☐ Partial withdrawal for the amount specified below.

Amount:

\$

► Proceed to Section 3.

OR

☐ Full withdrawal (the bond will be closed)

► Proceed to Section 4.

Important: Withdrawal requests received and verified prior to 1pm on a Melbourne business day will generally be processed using unit prices calculated as at the close of business that day. Please allow around seven Melbourne business days for the funds to be processed into your account.

Please provide your partial withdrawal instructions by selecting one of the below options.

OR

For percentage allocation, the total must add up to 100%.

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

Please provide your Australian financial institution account details for us to deposit your withdrawal.

Account details

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

Important: The account name for the above Australian financial institution must be the same as the payee account holder selected in this section.

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

Futurity can only process withdrawals upon receipt of fully completed forms.

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:

/

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Bond Owner / Director / Trustee 2

Signature:

Print name:

Capacity:

Date:

/

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* 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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