

## Lifeplan Investment Bond (LIB) updated electronic PDF application form

6 May 2021

We've recently reviewed the LIB electronic PDF application form to ensure it continues to meet regulatory obligations and continues to improve on the customer experience.

As a result, we've updated the application form with two key changes:

1. Enhancements to the application form to provide guidance for applications on behalf of a child (under 16 years of age).
2. New identification requirements for applications on behalf of a Child (under 16 years of age).

The updated [LIB electronic PDF application form](#) dated 6 May 2021 can be found in the [Adviser Portal](#) and on our [website](#).

The [LIB Product Disclosure Statement](#) dated 5 November 2020 has also been updated with this new LIB electronic PDF application.

### Key changes

#### 1. Enhancements to the application form to provide further guidance for applications on behalf of a child (under 16 years of age)

The application form has been updated to provide additional information for the two options available for applicants that wish to invest on behalf of a child (under 16 years of age). For both options, identification documents must be provided for the parents/guardian(s) and the child:

1. Applications can be made in the name of a child aged at least 10 and under 16 with the consent of a parent or guardian. Please note the child will be the policy owner of this investment. (Please complete Lifeplan Bond Application Form Part A).
2. The second option is for you to invest on behalf of a child through Lifeplan Child\*. Please note you will be the policy owner until the child reaches the nominated vesting age. (Please complete Lifeplan Child Application Form).

\* Lifeplan Child is worth considering for children under the age of 10, who are excluded from investing in the Lifeplan Bond (Refer to the Lifeplan Bond PDS for more information).

#### 2. New identification requirements for applications on behalf of a Child (under 16 years of age)

As part of the Anti-Money Laundering and Counter Terrorism Financing regulatory obligations, we have introduced the following new identification requirements when completing an application on behalf of a child (under 16 years old):

- For the Lifeplan Bond, you are now required to provide the identification documents for the child (under 16 years of age) and the parent/guardian(s) at the time of application; and
- For the Lifeplan Child, you are now also required to provide the identification documents for the child (under 16 years of age), to whom the policy will vest at a future nominated date, at the time of application.

Please refer to 'Applying for different types of investment accounts' in the LIB electronic PDF application form which outlines the required identification documents.

### **30-day grace period**

The updated LIB electronic application form replaces the previous LIB electronic PDF application form dated 5 November 2020.

Importantly, any applications using the previous LIB electronic PDF application form will only be accepted until 5 June 2021.

Any application sent to us after 6 June 2021 must use this updated LIB electronic PDF application form.

### **Further information**

Visit our website [australianunity.com.au/wealth](https://australianunity.com.au/wealth) for up to date information about the Lifeplan Investment Bond menu.

If you have any questions, please contact the Investor Services team on 1300 1300 38 or email [enquiries@australianunity.com.au](mailto:enquiries@australianunity.com.au), or the Adviser Services team on 1300 133 285 or email [investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au)