

# Switch/ Extension Form

## Investment Bond

Please PRINT clearly in BLACK or BLUE pen keeping well within the boxes. Use crosses in the boxes marked with an "X".

### 1. Member details

Account number

Title  Mr  Mrs  Ms  Miss Date of birth   /   /

Surname

Given name(s)

Residential address (not a PO Box)

Suburb  State    Postcode

Country (if not Australia)

Phone  Mobile

Email

### 2. Investment instructions

	Example	A	B	C	D
Account number(s)	IPO123456				

### 3. Switching

You can switch between the different investment options within Tax Smart's range. Switching is free of charge. There is minimum switching amount of \$1,000 (you must maintain a minimum of \$500 in each investment option).

	Example	A	B	C	D
Capital Guaranteed	20%				
Capital Guaranteed Mortgage	20%				
Conservative Growth	20%				
Balanced Growth	20%				
High Growth	20%				
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

#### 4. Extension of term

	Example	A	B	C	D
The term is extended by	5 years				

OR

	Example	A	B	C	D
The term is mature on	01/07/2024				

#### 5. Authorisation

I/We being the Bond Owner(s) of the Bonds listed above instruct and authorise the transactions as indicated above. For any withdrawals listed, I/We agree that the payment of such amount shall be full and sufficient discharge of the liability of Australian Unity in respect of the benefits surrendered.

Signature of claimant

Print name

Date

#### 6. Verification and certification

A verification document is required in support of this redemption request. Please provide a certified copy of any of the following that verify your (the applicants) full name, date of birth and current address:

Please place a tick in the document type that you have supplied.

Birth Certificate     Citizenship Certificate     Pension Card     Drivers Licence     Passport

#### Certification of documents

Where your identification documents need to be certified, we suggest that the person certifying the document(s) for you use the following statement on the copy being certified:

**'I certify this to be a true copy of [name of document] the original of which, was produced to me at the time of signing'.**

The document must also be dated, and have the signature, printed name, occupation, employer and address of the person certifying the document.

**List of persons who can certify copies of original documents:**

- Accountants (members of the Institute of Chartered Accountants, the Australian Society of CPA's or the National Institute of Accountants).
- Aldermen or Councillors of Municipal or Shire Councils.
- Bank, Building Society and Credit Union employees and agents authorised by their institution to open accounts.

- International Banks employees authorised by their institution to open accounts where the International Bank engages in a transaction with a cash dealer.
- Bailiffs.
- Barristers.
- Clerks of Courts.
- Clerks of Petty Sessions.
- Commissioned officers currently serving in the defence forces.
- Dentists.
- Diplomatic or consular officers to an Australian Embassy.
- Holders of statutory offices for which an annual salary is payable.
- Insurance company full-time employees who have been

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...Certification of documents continued

- employee continuously for at least five years by such company.
- Judges and Masters of Federal or State Parliament.
  - Justice of the Peace.
  - Members of an Aboriginal community council and recognised community elders of an Aboriginal community.
  - Medical Practitioners.
  - Members of Federal or State Parliament.
  - Members of the Legislative Assembly of the ACT, Northern Territory or Norfolk Island.
  - Ministers of Religion who are authorised Marriage Celebrants.
  - Notaries public.
  - Nursing sisters.
  - Pharmacists.
  - Police officers in charge of police stations.
  - Police officers in the rank of Sergeant or any greater ranking.
  - Postal managers.
  - Public employees – current full-time employees of Commonwealth, State, Territory or Local Governments or Statutory Authorities, who have been employees for at least 5 years by one or more of those employers.
  - Registrars of Federal or State Courts.
  - Sheriffs.
  - Solicitors.
  - Stipendiary Magistrates.
  - Teachers – full time, who have been teaching for more than 5 years at schools or tertiary institutions.



### Return by email

[investments@australianunity.com.au](mailto:investments@australianunity.com.au)



### Post

Send completed form together with relevant identification documents.

#### Within Australia

Australian Unity – Investment Bonds  
Reply Paid 91914  
Melbourne VIC 3000  
*(No stamp required if mailed  
within Australia)*

#### Outside Australia

Australian Unity  
GPO Box 4397  
Melbourne VIC 3001

### Contact us

#### Investor Services

**1300 1300 38**

**[australianunity.com.au/wealth](https://australianunity.com.au/wealth)**