

## Announcement

### IOOF WealthBuilder – Closure to new investor accounts

7 July 2025

Following the acquisition of IOOF Ltd ('IOOF') by Australian Unity Limited and the subsequent transfer of IOOF's business to Lifeplan Australia Friendly Society Limited ('Lifeplan'), we advise that Lifeplan, as the current issuer of the IOOF WealthBuilder investment bond, will close the product to new investor accounts effective 29 August 2025.

From this date we will no longer accept or process applications for new investors into the IOOF WealthBuilder investment bond.

Importantly, there will be **no changes** to how existing IOOF WealthBuilder clients interact with us. Existing IOOF WealthBuilder clients will continue to be able to:

- add to their investment through one-off applications or through Regular Savings Plans;
- switch underlying investment options; and
- make withdrawals through one-off requests or through the Regular Withdrawal Facility.

#### Further information

If you have any queries with regards to a client's existing investment, please contact Insignia Financial at 1800 002 217 or email [investorservices@insigniafinancial.com.au](mailto:investorservices@insigniafinancial.com.au).

If you have any queries regarding this announcement or Australian Unity, 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)

IOOF WealthBuilder is issued by Lifeplan Australia Friendly Society Limited ABN 78 087 649 492 AFS Licence number 237989 ('Lifeplan'), a wholly owned subsidiary of Australian Unity Limited ABN 23 087 648 888.. This announcement is pursuant to ASIC Corporations Instrument 2016 /1055.

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