

## Announcement

### Funeral Plan Bond – Updated Exempt Funeral Investment Threshold

25 July 2025

We wish to inform you of an update to the exempt funeral investment threshold published in the Funeral Plan Bond Product Disclosure Statement (PDS) dated 7 July 2025.

The threshold is generally indexed to the Consumer Price Index (CPI) on 1 July each year. The updated threshold for the 2025–2026 year is \$15,750.

#### Exempt Funeral Investment Threshold:

Financial Year	Limit
2024–2025	\$15,500
2025–2026	\$15,750

For more information about the exempt funeral investment threshold, visit the website of the Department of Human Services or the Department of Veterans Affairs.

#### Further information

If you have any questions, please contact the Investor Services team on 1800 804 731 or email [funeralplans@australianunity.com.au](mailto:funeralplans@australianunity.com.au), or the Adviser Services team on 1300 133 285 or email [investmentbonds@australianunity.com.au](mailto:investmentbonds@australianunity.com.au).

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This information is intended only to provide a general update on the investment particulars of these products. The information provided here was current at the time of publication only and we recommend that you speak to your financial adviser or contact us for further information. The Product Disclosure Statement (PDS) and target market determination (TMD) are available at [australianunity.com.au/funeral-plan-bond](https://australianunity.com.au/funeral-plan-bond) or by calling our Investor Services team on 1800 804 731.