

## Announcement

### 10Invest Product Disclosure Statement changes

10 April 2026

An updated Product Disclosure Statement (PDS) has been issued for 10Invest effective 10 April 2026.

The updated version of the 10Invest PDS includes the following key changes:

- the addition of a new Vanguard investment option to the 10Invest investment menu (the Vanguard High Growth Index Fund);
- the incorporation of the content in the Supplementary Product Disclosure Statement dated 10 June 2025 relating to the 125% rule;
- inclusion of additional information about Membership of Australian Unity Limited (AUL); and
- updates to the wording in the 'How 10Invest works' illustrative graphic and inclusion of important information relating to the calculations and assumptions represented in the graphic.

More detail about these updates is set out below.

#### **Additional investment option**

The Vanguard High Growth Index Fund has been added to the existing six investment options in the 10Invest investment menu. For more information about this investment option refer to the 10Invest PDS.

#### **The 125% Rule**

The content in the Supplementary Product Disclosure Statement dated 10 June 2025 has been incorporated into the PDS. This content relates to how exceeding the 125% contribution rule can reset the start date of your investment to the investment year in which the excess contribution occurred.

#### **Membership of Australian Unity Limited**

Enhancements have been made to the section headed 'Your relationship with Lifeplan and Australian Unity Limited' to add more information in relation to 10Invest investors' right to membership of AUL, subject to the eligibility criteria.

#### **Amendments to the 'How 10Invest works' illustrative graphic**

Minor changes have been made to the wording in the illustrative graphic to enhance clarity. In addition, important information has been added (in the form of a disclaimer) to provide more detail about the assumptions used in the calculation of the assessable amount referred to in the illustrative graphic.

#### **Transition period**



We will accept new applications on the previous 10Invest Application Form for a maximum of 30 days after 10 April 2026 (effective date of the 10Invest PDS). This transition period will expire on 10 May 2026. Any application sent to us from 10 May 2026 must be completed on the 10Invest Application Form dated 10 April 2026.

### Further information

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)

Visit our website [australianunity.com.au/wealth](https://australianunity.com.au/wealth) further information or refer to the 10Invest PDS.

### Important information

10Invest 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 information is general information only and is current at the time of publication. It does not take into account your objectives, financial situation or needs. Before acting on this information, please consider its appropriateness, having regard to your objectives, financial situation and needs. Before making investment decisions, you should read the applicable Product Disclosure Statements (PDS). The applicable PDS and the Target Market Determination (TMD) is available on our [website](#). Past performance is not a reliable indicator of future performance.

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