

## Lifepan Investment Bond (LIB) fund option changes

### 5 November 2020

As part of managing our investments, we regularly review options to ensure optimal results for our investors. As a result, we've updated the investment options within the Lifepan Investment Bond. There are four key changes:

1. New funds have been added to the LIB investment option menu effective 5 November 2020
2. Some existing funds have been closed to new investors with effect from 5 November 2020
3. Some existing funds will no longer be available from 11 December 2020
4. The LIB application form is now a separate document to the [Product Disclosure Statement](#) (PDS) and is included as an Appendix in the PDS

#### 1. New funds added to the LIB investment option menu as of 5 November 2020

The following funds have been added to the LIB Investment option menu, and will be open to new investment from 5 November 2020:

- Allan Gray Australian Equity Fund – Class A
- Alphinity Sustainable Share Fund
- Antipodes Global Fund
- Ardea Real Outcome Fund
- Bennelong Concentrated Australian Equities Fund
- Firetrail Australian High Conviction Fund – Class A
- Hyperion Global Growth Companies Fund
- P/E Global FX Alpha Fund
- Stewart Investors Worldwide Sustainability Fund – Class A
- Vanguard Global Infrastructure Index Fund

#### 2. Existing funds closed to new investors from 5 November 2020

The following funds have been removed from the LIB investment option menu effective 11 December 2020 and will not be available to new investors in LIB. To allow for applications already underway with a financial adviser, we will accept applications by new investors into these options for a maximum of 30 days after the effective date of the new LIB PDS. These options will remain open to existing investors and we will continue to accept additional contributions and Regular Savings Plans:

- Altius Bond Fund
- APN AREIT Fund
- Colonial First State FirstChoice Australian Share
- Colonial First State FirstChoice Global Share
- Colonial First State FirstChoice Property Securities
- Lifepan Managed Investment
- Pandal Fixed Interest Fund
- Perpetual Wholesale Australian Share Fund
- Talaria Global Equity Fund

### 3. Existing funds no longer available

The following funds have been removed from the LIB investment option menu as of 7 December 2020. We've asked investors asked to find an alternate option to transfer to:

- Altrinsic Global Equities Trust
- AMP Capital Global Property Securities
- AMP Capital Multi-Asset A
- Antares Elite Opportunities Fund
- Colonial First State FirstChoice Wholesale Emerging Markets
- MLC Wholesale Index Plus Growth Portfolio

In addition, there are several options that have been closed to new investment for some time that will no longer be available to existing investors. Investors in the following options will also need to find an alternate option into which to transfer the investment:

- AMP Capital Future Directions Balanced
- AMP Capital Responsible Investment Leaders Balanced
- CFS Geared Australian Share Core
- CFS Wholesale Target Return Income
- Maple Brown Abbott Australian Share

### 4. The LIB application form is now separate to the Product Disclosure Statement (PDS)

To reflect the changes to the investment options the PDS has been updated. As part of the changes to the PDS, the Application Form is now a separate document.

The Application Form is included in the PDS as an Appendix.

We will accept applications on the previous application form for a maximum of 30 days after the effective date of the new [LIB PDS](#), where there is an application already underway with a financial adviser.

#### 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](http://australianunity.com.au/wealth) for any further fee changes to the underlying investment options in the Lifeplan Investment Bond menu.