Investment Bonds also Referred to as Life Events Bonds

Withdrawal Form

This form should be completed if you wish to make a withdrawal from your investment with KeyInvest.
Please return the completed form to KeyInvest Ltd (KeyInvest) or phone KeyInvest on **1300 658 904**.

Member Number		Policy Number	

1. Policy Holder(s) Details

Policy Holder 1

Title		Mr		Mrs		Ms		Miss		Dr	Other
Surname/Company/ Trust Name											
Given Names											
Date of Birth					If Company, ABN						

Policy Holder 2

Title		Mr		Mrs		Ms		Miss		Dr	Other
Surname/Company/ Trust Name											
Given Names											
Date of Birth					If Company, ABN						

Contact Details

Unit Number		Street №			
Street Name				Suburb	
State		Postcode		Country	
Home Phone					
Business/Mobile				Fax	
Email					

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2. Payment Instructions

Please note third party payments are not available.

☐ **Credit my financial institution account** *Complete Section 3*

3. Nominated Account Details

Please credit my withdrawal to the account below.

Name of financial institution			
Branch			
Account Name			
BSB Number		Account Number	

Please ensure that the BSB and Account number are correct. KeyInvest does not check your account name with the BSB and Account number given. Providing an incorrect BSB and Account number could result in the funds being paid to an unintended recipient and funds may not be able to be recovered.

4. Withdrawal Instructions

Investment Bond or Supersaver Bond Fund – A withdrawal made before the end of your '10 year anniversary' of your Investment Bond or Supersaver Bond Fund policy may result in tax implications. Refer to the Product Disclosure Statement for more information and it is recommended that you seek advice from your Financial Adviser.

Minimum account balance for the Investment Bond is $500 and $1000 for the Supersaver Fund.

☐ **Full Withdrawal** *Complete Section 3 and Section 8*
Please Note: Personal ID is required (e.g. driver's license or passport)

☐ **Partial Withdrawal** *Please indicate in Section 6 or 7 the amount to be withdrawn in dollars against the relevant fund.*

5. Reason for Withdrawal

☐ **Property Purchase**

☐ **Vehicle Purchase**

☐ **Renovations**

☐ **Unexpected Expenses** (please specify)

☐ **Other** (please specify)

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Withdrawal Form

6. Supersaver Bond Fund

Investment Fund	Withdrawal amount
Supersaver Bond Fund (min $500)	$
Investment Bond	Please complete section 6

7. Investment Details

Investment Bond Minimum withdrawal amount is $100 and $50 per investment option.

Investment Options	Fund Mgr	Fund Code (KI use only)	Withdrawal Amount
Part A Indexed Diversified			
Conservative Index	Vanguard	LEB1	$
Balanced Index	Vanguard	LEB2	$
Growth Index	Vanguard	LEB3	$
High Growth Index	Vanguard	LEB4	$
Part B Indexed Sector			
Australian Fixed Interest Index	Vanguard	LEB5	$
Australian Property Securities Index	Vanguard	LEB6	$
Australian Shares Index	Vanguard	LEB7	$
International Shares Index	Vanguard	LEB8	$
iShares Australian Bond Index	BlackRock	LEB28	$
iShares Australian Equity Index	BlackRock	LEB29	$
iShares Australian Listed Property Index	BlackRock	LEB30	$
iShares International Equity Index	BlackRock	LEB31	$
iShares Hedged International Equity Index	BlackRock	LEB32	$
Part C Diversified			
* Wholesale Inflation Plus – Assertive Portfolio	MLC*	LEB13*	$
World Class Allocation 30/70	Dimensional	LEB9	$
World Allocation Trust 50/50	Dimensional	LEB10	$
World Allocation Trust 70/30	Dimensional	LEB11	$
World Equity Trust	Dimensional	LEB12	$
Part D Sector Specific			
Cash and Fixed Interest			
Real Outcome	Ardea	LEB35	$
* Smarter Money – Institutional Class A	Coolabah*	LEB16*	$
Term Deposits	KeyInvest	LEB15	$
Short Term Income Securities	Pendal	LEB34	$
Diversified Fixed Interest	PIMCO	LEB36	$
* Australian Cash – Class A	Russell*	LEB14*	$
* Fixed Income	Schroder*	LEB17*	$
Cash **	UBS	LEB33	$

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Investment Options	Fund Mgr	Fund Code (KI use only)	Withdrawal Amount
Australian Equities			
Managed Volatility Equities	AllianceBernstein	LEB38	$
Australian Equities	Fidelity	LEB20	$
Broadcap	Greencape	LEB39	$
Australian Share	Investors Mutual	LEB22	$
All Industrials Share	Investors Mutual	LEB23	$
Wholesale Geared Australian Share	Perpetual	LEB25	$
* Australian Shares – Class A	Russell*	LEB21*	$
Property and Infrastructure			
Infrastructure	Magellan	LEB19	$
Real Income – Class A	Martin Currie	LEB37	$
Global Equities			
Vinva Global Alpha Fund - Active ETF	Magellan	LEB27	$
* International Shares – Class A	Russell*	LEB26*	$
Global Equity – I Class	T Rowe Price	LEB42	$
Quality Global Growth (Managed Fund)	WCM	LEB41	$
Part E SRI/ESG			
Sustainable Share Fund	Alphinity	LEB43	$
Diversified ESG Stable	BlackRock	LEB44	$
Total Withdrawal			$

* Closed to new investors

** Current default Cash Investment Option for progressive investing. Check the KeyInvest website for any updates.

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8. Declaration and signatures

— I/we declare that all details in this form are true and correct.
— I/We authorise KeyInvest to process the instructions set out in this form.
— I/We acknowledge that the processing of my/our instructions may be delayed if the form is incomplete.
— I/We confirm that I/We have received a copy of the current Product Disclosure Statement (PDS), have read, understood the PDS, and agree to be bound by the terms and conditions set out in the PDS.
— If this form is signed under Power of Attorney, the Attorney certifies that he/she has not received notice of revocation of that power.
— If your Power of Attorney has not previously been registered by us, we will require a certified copy of the Power of Attorney document as well as the appropriate proof of identification documents in accordance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

Signature of Policy Owner 1

Date

Signature of Policy Owner 2

Date

Company Seal
(if applicable)

Contact Details

Street Address: KeyInvest
Level 3 North, 191 Pulteney Street
Adelaide SA 5000

Postal Address: KeyInvest
PO Box 3340
Rundle Mall SA 5000

Phone 1300 658 904
Email info@keyinvest.com.au
Web www.keyinvest.com.au
Hours 8.30am – 5.00pm (CST)