

### 1 CLIENT DETAILS

#### INVESTOR 1

Title (Mr/Mrs/Ms etc)	Account Number (if known)
<input type="text"/>	<input type="text"/>
Surname/Company Name	
<input type="text"/>	
Given Name/Company Contact	Contact Number
<input type="text"/>	( )
Account Designation	
<input type="text"/> <span style="float: right;">A/C&gt;</span>	

#### INVESTOR 2

Title (Mr/Mrs/Ms etc)	
<input type="text"/>	
Surname	
<input type="text"/>	
Given Name	Contact Number
<input type="text"/>	( )

### 2 WITHDRAWAL DETAILS

Please tick a box to indicate the frequency of withdrawal:

One Off       Monthly       Quarterly       Half Yearly

*I wish to:*      Withdraw ALL of my benefit       Make a PARTIAL withdrawal

Month to commence       Withdrawal Amount (minimum of \$300) \$

Regular withdrawals paid via Direct Credit are sent to your nominated financial institution on the 15<sup>th</sup> of each month, or the next business day

#### PAYMENT METHOD

Please tick a box to indicate payment method:

Cheque       Made payable to:

Direct Credit  (complete section below)

Financial Institution Name	<input type="text"/>
Branch Name	<input type="text"/>
BSB	<input type="text"/> - <input type="text"/>
Account Number	<input type="text"/>
Account Name	<input type="text"/>

### 3 PROOF OF IDENTITY

**You will need to provide us with Certified ID in order to have your Benefit Payment request processed.**

I have attached a certified copy of my driver's licence or passport

**OR**

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card      **AND**       Centrelink payment letter of Government or local council notice (less than one year old) containing my name and address



**7 DIRECT CREDIT SERVICE AGREEMENT**

By signing the Direct Credit Authority you are authorising us to deposit in your nominated account. We may only deposit into your account for either a once-off direct credit payment at your request, or a regular arrangement at your direction. Direct credits will be made on the following understanding:

**Our commitment to you for Direct Credit:**

We will:

- Arrange for funds to be credited to your account.
- Keep information relation to your Direct Credit request private and confidential.
- Only disclose information that we have about you in relation to this Agreement:
  - To the extent specifically required by law; or
  - For the purpose of this Agreement (including disclosing information in connection with any queries or claims).
- At all times act according to the terms & conditions set out in the LifeFocus Investment Fund PDS and in accordance with the prescribed legislation with respect to your request for a fund withdrawal. The Responsible Entity is not reliable for any losses you may incur due to providing incorrect information or time delays in processing.

If the due date of the direct credit falls on a weekend or public holiday, your account will be credited on the next working day.

**Your commitment to us:**

It is your responsibility to:

- Ensure that the account details you have provided are correct by checking them against a recent account statement.
- Advise us if your nominated account is transferred or closed, or the account details have changed in writing prior to the next credit.

**Your rights:**

- You may defer, alter or cancel the crediting arrangements you hold with us at any time by writing at least two weeks before the next credit is due.
- Where you consider that a direct credit has been made incorrectly, you may contact the LifeFocus Customer Support Team on 1300 137 909 who will promptly investigate your query and provide a response.
- If you are not satisfied with the response you receive you may refer it to your financial institution, which may lodge a claim on your behalf.

**Notice**

If you wish to notify us in writing about anything relating to this Agreement, you should send your notice to:

**Send this form to:      LifeFocus Investment Fund  
   PO Box 1282  
   ALBURY NSW 2640**