

Member No:

Policy No:

### 1) Policy Owner(s) Details

#### Policy Owner 1

Title  Mr  Mrs  Ms  Miss  Dr Other

Surname

Given name(s)

Date of birth  If Company, ABN

#### Policy Owner 2

Title  Mr  Mrs  Ms  Miss  Dr Other

Surname

Given name(s)

Date of birth  If Company, ABN

#### Contact Details

Unit no.  Street no.

Street name  Suburb

State  Postcode  Country

Home phone

Bus/Mobile  Fax

Email

### 2) Switch Request Details

What do you want to do? (tick the relevant box)    **Full Switch**     **Partial Switch**

### 3) Important Switching Information

Switching between the Conservative Index Fund, Balanced Indexed Fund, Growth Index Fund is permitted at any time. A minimum amount of \$100 per switch is applicable and whilst there are no switching fees, buy/sell costs (page 16 of the PDS) may be applicable.

You may also elect to switch into the Capital Guaranteed Fund at any time (minimum \$100 per switch), **but any funds switched into the Capital Guaranteed Fund cannot be switched out under any circumstances.**

#### Suspensions or delays when processing switching transactions or unit pricing.

KeyInvest may temporarily suspend or delay the processing of both transactional requests (switches) and/or calculating unit prices on any business day as a result of any of the following:

- Regular accounting practices based around half year and full year financial year processes,
- Unavailability of unit prices for valuation purposes,
- An appointed Investment Manager suspending or delaying transactions and/or unit pricing,
- Liquidity issues in the Investment Option, the Investment Options underlying portfolio or financial markets in general,
- Closure of financial markets, and
- Other events or extraordinary circumstances beyond the control of KeyInvest that impose on our ability to accurately calculate a unit price.

### 4) Investment Details

No.	Investment Option	Fund Manager	From (% or \$ amount)	Fund Code KI use only	To (% or \$ amount)
1	Conservative Index	Vanguard		51	
2	Balanced Index	Vanguard		52	
3	Growth Index	Vanguard		53	
4	KeyInvest Capital Guaranteed	Janus Henderson		50	
<b>TOTAL</b>					

**Note: Once invested in the Capital Guaranteed Fund you must remain in that option. You are NOT permitted to switch into any other investment option.**

### 5) Declaration

I/we the policy owner(s), whose signature(s) appear below, hereby understand/acknowledge and agree as follows:

- My/our decision in relation to this product is based on the material received, including the Product Disclosure Statement (PDS) which I/we have received, read and understood.
- I/We agree to be bound by the terms of my/our Policy.
- In the event of any inconsistency between the terms of my/our Policy and the information contained in the PDS, the terms of the policy will prevail.
- I/We accept that KeyInvest may send me/us information about its products or services from time to time. I/We understand that I/we may notify you of my/our decision not to receive further information by contacting you directly.
- I/We acknowledge that funds will be contributed as per my/our instructions above as at the date of acceptance of this form by KeyInvest.
- I/we acknowledge that for the Funeral Bond, the unitised options used to purchase units will be the unit price effective the day that KeyInvest receives the completed additional investment form. Forms received after 2:00PM CST on a Tuesday will be processed using the following days unit price.
- I/We acknowledge that the performance of an investment fund is not guaranteed by KeyInvest Ltd unless otherwise stated in the PDS.
- I/We consent to the collection, use, storage and disclosure of my personal information as described in KeyInvest's Privacy Policy which is available at [www.keyinvest.com.au](http://www.keyinvest.com.au), or by calling KeyInvest.
- I/We acknowledge that for the Funeral Bond, the unitised options used to purchase units will be the unit price effective the day that KeyInvest receives the completed Switch Request Form. Forms received after 2:00pm CST on a Tuesday will be processed using the following days unit price.

Signature of Policy Owner 1

Date <input type="text" value="DD / MM / YY"/>

Signature of Policy Owner 2

Date <input type="text" value="DD / MM / YY"/>

### 6) Contact Details

**Phone:** 1300 658 904  
**Email:** [info@keyinvest.com.au](mailto:info@keyinvest.com.au)  
**Web:** [www.keyinvest.com.au](http://www.keyinvest.com.au)  
**Hours of Operation:**  
8.30am - 5.00pm (CST)

**Postal Address:**  
KeyInvest  
PO Box 3340  
Rundle Mall SA 5000

**Street Address:**  
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Level 5, 49 Gawler Place  
Adelaide SA 5000