



# Life Events Bond Progressive Investing

## Guide to completing this form

- This form is to be completed by investors who want to put in place a Progressive Investing (Dollar Cost Averaging) strategy.
- As a dollar cost averaging strategy, this facility will allow you to invest your initial funds and subsequent contributions on a monthly basis, during a one off twelve-month period.
- The minimum initial and subsequent contributions is \$20,000. Please ensure the required minimum amount is met.

## 1. Policy Owner details

Policy Number

### Investor/s

Full Given Name(s)

Date of Birth

# Life Events Bond Progressive Investing

## 2. Investment details - Minimum \$20,000

Amount of Investment \$

Amount to be invested in UBS Cash - LEB33

### 2.1 Investment allocation

Please allocate my investment according to the specific investment allocations I provide on the next page.

**Please note: The minimum allocation for each investment option is \$500.**

Investment Menu	UFM	Fund Code (KI use only)	Initial Amount Invested (min \$20,000)	Monthly Progressive Switch Into
<b>Part A Indexed Diversified</b>				
Conservative Index	Vanguard	LEB1	\$	\$
Balanced Index	Vanguard	LEB2	\$	\$
Growth Index	Vanguard	LEB3	\$	\$
High Growth Index	Vanguard	LEB4	\$	\$
<b>Part B Indexed Sector</b>				
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	\$	\$
<b>Part C Diversified</b>				
* Wholesale Inflation Plus – Assertive Portfolio	MLC*	LEB13*	\$	\$
Conservative – Class A	Russell	LEB9	\$	\$
Balanced – Class A	Russell	LEB10	\$	\$
Growth – Class A	Russell	LEB11	\$	\$
High Growth – Class A	Russell	LEB12	\$	\$
<b>Part D Sector Specific</b>				
<b>Cash and Fixed Interest</b>				
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	\$	\$

Investment Menu	UFM	Fund Code (KI use only)	Initial Amount Invested (min \$20,000)	Monthly Progressive Switch Into
<b>Australian Equities</b>				
Managed Volatility Equities	AllianceBernstein	LEB38	\$	\$
Australian Equities	Fidelity	LEB20	\$	\$
Broadcap	Greencap	LEB39	\$	\$
Australian Share	Investors Mutual	LEB22	\$	\$
All Industrials Share	Investors Mutual	LEB23	\$	\$
Wholesale Geared Australian Share	Perpetual	LEB25	\$	\$
* Australian Shares – Class A	Russell*	LEB21*	\$	\$
<b>Property and Infrastructure</b>				
Infrastructure	Magellan	LEB19	\$	\$
Real Income – Class A	Martin Currie	LEB37	\$	\$
<b>Global Equities</b>				
Global - Open Class	Magellan	LEB27	\$	\$
* International Shares – Class A	Russell*	LEB26*	\$	\$
Global Equity – I Class	T Rowe Price	LEB42	\$	\$
Quality Global Growth (Managed Fund)	WCM	LEB41	\$	\$
<b>Part E SRI/ESG</b>				
Sustainable Share Fund	Alphinity	LEB43	\$	\$
Diversified ESG Stable	BlackRock	LEB44	\$	\$
<b>Total Invested</b> (before deducting stamp duty)			\$	\$

**Total dollar (\$) amount must equal the amount invested in Section 2.**

\* Closed to new investors

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

### 3. Progressive Investing (dollar cost averaging)

For investment amounts of \$20,000 or more, you can elect to have your investment amount progressively invested on a monthly basis (up to a maximum of 12 payments) according to your Investment Allocation. Your investment will be initially be invested in the UBS Cash Option.

**Please provide the number of payments below if you want to progressively invest your additional investment.**

Invest according to my Default Investment Allocation in  Equal Payments  
(maximum of 12 payments)

The Progressive Investing feature is subject to the terms and conditions contained in the Product Disclosure Statement.

The first payment will occur when this investment via direct debit request is finalised and second subsequent payments will normally occur on the 21st of each month or the next SA business day.

**Important:**

**If the auto-rebalancing facility has been selected in an existing or previous investment portfolio, the annual auto-rebalancing will not occur while a current active Progressive Investing is in place.**

### 4. Identification information

**Select the origin and source of funds being invested.**

To comply with Anti-Money laundering and Counter-Terrorism Financing Act 2006, we require you to disclose whether you (or any key beneficial owners) are or have an association with a politically exposed person. Your additional investment cannot be processed without this information.

Yes  No

Please select the origin and source of funds being invested

<input type="checkbox"/> Employment Income	<input type="checkbox"/> Investments	<input type="checkbox"/> Business Income	<input type="checkbox"/> Borrowed Funds
<input type="checkbox"/> Windfall (lottery win/gift)	<input type="checkbox"/> Sale of Assets	<input type="checkbox"/> Other (please specify)	

## 5. Direct Debit details and authorisation

**This authority is for one payment only of \$**

### **Bank Details**

Bank Name  
and Branch

Account Name

BSB Number

Account Number

I/We request and authorise KeyInvest Ltd - Identification Number 113657 to arrange for any amount KeyInvest Ltd may debit or charge to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified above subject to the terms and conditions of the Direct Debit Request Service Agreement and any further instructions provided.

By signing this Direct Debit Request Form, I/we acknowledge having read and understood the terms and conditions governing the debit arrangements as set out in this Request Form and in the Direct Debit Request Service Agreement.

### **Important:**

**The account name for the above financial institution must be the same as the account name of the investment.**

**Signature of Account Holder 1**

**Signature of Account Holder 2**

Full Name

Full Name

Date

Date

## 6. 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 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 Account Holder 1

### Signature of Account Holder 2

Full Name

Full Name

Date

Date

Please select the appropriate box:

Individual

Trustee

Individual

Trustee

Director

Power of Attorney

Director

Power of Attorney

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## You can submit this form by Email and mail:

### Street Address:

KeyInvest  
Level 5, 49 Gawler Place  
Adelaide SA 5000

### Postal Address:

KeyInvest  
PO Box 3340  
Rundle Mall SA 5000

**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** 8.30am – 5.00pm (CST)