



# KeyInvest Investment Bonds

## Life Events Bond Switch Request Form



### 2. SWITCH REQUEST DETAILS

Full switch       Partial switch

Please use the percentage option when switching an entire balance from an investment fund. If the percentage option is selected, the amount written should represent the percentage of monies that you wish to switch. For example, if you have monies invested in two investment options and you wish to switch all monies from one option to the other; you would write 100% in the column of the option that you are switching from and 100% in the column that you are switching to.

Step 1 - nominate where investments are being switched from:

Investment Option	Switch from - amount or %												
Balanced	\$			,			.			or			%
Growth	\$			,			.			or			%
High Growth	\$			,			.			or			%
Australian Shares	\$			,			.			or			%
International Shares	\$			,			.			or			%
Australian Cash	\$			,			.			or			%
<b>TOTAL</b>	\$			,			.			<b>or</b>			%

Step 2 - nominate where investments are being switched to:

Investment Option	Switch to - amount or %												
Balanced	\$			,			.			or			%
Growth	\$			,			.			or			%
High Growth	\$			,			.			or			%
Australian Shares	\$			,			.			or			%
International Shares	\$			,			.			or			%
Australian Cash	\$			,			.			or			%
<b>TOTAL</b>	\$			,			.			<b>or</b>			%

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### 3. FUTURE INVESTMENTS FOR REGULAR INVESTMENT PLAN

Completing this section will ensure that all future regular investments are allocated to your selected investment option(s)

Investment Option	Future investment allocation								
Balanced	\$		,		.		or		%
Growth	\$		,		.		or		%
High Growth	\$		,		.		or		%
Australian Shares	\$		,		.		or		%
International Shares	\$		,		.		or		%
Australian Cash	\$		,		.		or		%
<b>TOTAL</b>	\$		,		.		or	<b>100</b>	<b>%</b>

**Please note:** The Life Events Bond Product Disclosure Statement (PDS) provides details of the current terms and conditions. If no investment option(s) is/are nominated, monies will be placed in accordance with the instructions contained in your original Application Form or any subsequent amendments.

### 4. 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 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 Ltd 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 switched as per my/our instructions above as at the date of acceptance of this form by KeyInvest.
- I/We acknowledge that the performance of an investment fund is not guaranteed by KeyInvest Ltd unless otherwise stated in the PDS.

**Signature of Policy Owner 1**

Date

**Signature of Policy Owner 2**

Date

Company Seal  
(if applicable)



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### 5. CONTACT US

Street Address: KeyInvest Ltd  
Level 2, 49 Gawler Place  
Adelaide SA 5000

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

Phone: 1 300 658 904  
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)

#### OFFICE USE ONLY

Policy Owner/Member details and signature verified:

Processing of form complete:

Date:

D	D	M	M	Y	Y	Y	Y
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