

# KeyInvest Funeral Bond

## Switch Request Form



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

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### 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	
TOTAL					

**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.**

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### 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 DS 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 DS, 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 KeyInvest 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
- 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.

Signature of Policy Owner 1

Date

Signature of Policy Owner 2

Date

### 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:

KeyInvest  
Level 5, 49 Gawler Place  
Adelaide SA 5000