



# Additional and regular investments

## MLC MasterKey Unit Trust

You can update these details online. To do this login to [mlc.com.au](http://mlc.com.au). We can only accept your request if the form is correctly completed. We respect your privacy and handle your information in accordance with our privacy policy, available at [mlc.com.au](http://mlc.com.au)

### 1. Your account details

Account number	Customer number (if known)	Contact telephone (business hours)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Account name		
<input type="text"/>		
Email	Date of birth (DD/MM/YYYY) (if applicable)	
<input type="text"/>	<input type="text"/>	

### 2. Your investment type

Additional one-off investment  Complete **Section 3**

New regular investment  Complete **Section 4**

### 3. Additional one-off investment

#### Amount

\$

#### Your investment options

Do you wish to nominate a new investment strategy for this investment?

No  Please use the existing pre-nominated investment strategy. **Go to page 2.**      Yes  Please list your investment options in the table below. This will apply to this investment only.

If you have more investment options, please attach a separate list.

Please write the full name of the investment option	Amount \$	or	Percentage
	\$		%
	\$		%
	\$		%
	\$		%
	\$		%
	\$		%
	\$		%
	\$		%
	\$		%
Percentages must total 100%. <b>Total</b>	\$		%

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### 3. Additional one-off investment continued

#### Your payment options

How would you like to make your additional one-off investment?

**Direct debit**  Please complete your bank details in **Section 5**.

**Cheque**  For MLC MasterKey Unit Trust accounts  
**Pay to MLC Investment Services Trust Account.**

For security, print your full name, address and account number on the reverse side of the cheque.  
**We cannot accept endorsed cheques.**

Please go to **Section 6**.

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### 4. New regular investment

Please use this section if you want to establish a new regular investment.

If you want to change or cancel an existing regular investment please use the **Update account details** form available on **mlc.com.au**

If you want more than one regular investment please complete a separate form.

#### Amount

\$

#### Start date (DD/MM/YYYY)

If you haven't given us a date, the direct debit will occur on the first business day of the month.

#### End date (DD/MM/YYYY)

You only need to provide an end date if you want your investment to stop at a specified date.

**If your request is not processed in time to meet this date, we'll use the next available date for the frequency you have selected.**

#### Frequency

Please indicate the preferred frequency of your regular investment. If this isn't specified the **monthly** frequency will apply.

Weekly

Fortnightly

Monthly

Quarterly

Half Yearly

Yearly



## 5. Bank details

### Direct debit request schedule

#### Account one

Name of bank

Name of account

BSB

				-			
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Account number

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Please select the type of investment to be drawn from this account:

- Regular investment
- Additional investments

### Direct Debit Request

As the holder of the above account, I request MLC Investments Ltd to draw money from my account. I acknowledge this direct debit arrangement is governed by the Direct Debit Request Service Agreement set out at [mlc.com.au/ddrsa](http://mlc.com.au/ddrsa). I consent to the agreement being made available at [mlc.com.au/ddrsa](http://mlc.com.au/ddrsa), as well as to the terms of the agreement.

### Signature of account holders

Must be signed by all bank account holders if different to signatory in Section 7

X	Date (DD/MM/YY)					
	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>					

X	Date (DD/MM/YY)					
	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>					

Please go to **Section 6**.

#### Account two

Name of bank

Name of account

BSB

				-			
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Account number

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## 6. Investment suitability

To assess which investment options are right for you, please refer to the relevant disclosure documents for each investment option selected for investment objectives and timeframes, and risk measures. Please respond to the following questions for all investment products you've selected:

The investments I've selected have a risk measure that I'm prepared to accept

Yes  No

I'm aware of the minimum suggested investment timeframe

Yes  No

If you don't answer, we'll presume your answers are 'Yes'.

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## 7. Your agreement and declaration

### I agree:

- if my completed request is received before 3 pm (AEST/AEDT), it will usually be processed using the unit price for that business day (which is calculated at the end of the day)
- if my completed request is received after 3 pm (AEST/AEDT), it will usually be treated as having been received the next business day
- where I have invested into an illiquid investment option or an investment option I have, has become illiquid, we may take longer to transfer out of the investment option.

Before making this change I have considered the information in the Product Disclosure Statement about the investment options I have selected. I have also reviewed the information on the management of my account in the **How to Guide**. (These documents are available on [mlc.com.au](http://mlc.com.au))

**If signed under the Power of Attorney:** Attorneys must attach a certified copy of the Power of Attorney if not already supplied. The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be accepted by fax.

### Signature 1 Investor or Attorney

X	Date (DD/MM/YY)
	<input type="text"/>

### Signature 2 Investor or Attorney

X	Date (DD/MM/YY)
	<input type="text"/>

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## 8. Financial adviser details

Was personal financial advice provided with this application?

Yes  No

If you don't answer this question we'll assume the answer is 'No'.

Name of financial adviser

Adviser number

Contact telephone number (business hours)

Fax number

Email

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## 9. Send us your form

Please mail or email your completed, signed and dated form to:

**MLC**

**PO Box 200**

**North Sydney NSW 2059**

**Email: [contactmlc@mlc.com.au](mailto:contactmlc@mlc.com.au)**

If you have any questions, please speak with your financial adviser, call us on **132 652** Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT) or visit **[mlc.com.au](http://mlc.com.au)**