

Regular savings plan request

Please complete this form using **BLACK INK** and **CAPITAL** letters.

1. Client details

Account name

Address

Town or suburb

State

Postcode

2. Action to be taken

- Start new savings plan
- Amend existing savings plan
- Cancel savings plan

3. Direct debit request

Commencement

 / /

Managed Account Model Portfolio ID (e.g. BG)

Managed Account Model Portfolio name (e.g. Balanced Growth)

I/We request that you, until further notice, debit each month my/our account detailed below \$ _____ which OneVue Wealth Services Limited ('The User') may debit or charge me/us through the direct debit system.

Direct debit information

- ▶ There is a minimum investment of \$100 per month per Managed Account Model Portfolio.
- ▶ Direct debiting is not available on the full range of accounts, or may not be offered by some financial institutions. Please contact your financial institution if you are not sure.
- ▶ The financial institution may charge a fee for the direct debit arrangement.
- ▶ By agreeing to participate in the Regular Savings Plan, you agree to release, discharge and indemnify us and the Custodian, individually and jointly, from and against loss, expense, action claim or other liability which may be suffered by you or brought against us or the Custodian for any use or purported use of the Regular Savings Plan.
- ▶ This form must be read in conjunction with the current Service Guide.

4. Financial institution and account details

Bank/Institution

Branch name

Account name

BSB

 -

Account number

Branch address

Town or suburb

State

Postcode

5. Declaration(s)

I/We acknowledge that this Direct Debit arrangement is governed by the terms of the Regular Savings Plan Terms and Conditions (please see below).

Signature - Investor 1/Trustee 1/Director 1/Sole Director
(you MUST circle one)

Date

 / /

Please print name

Signature - Investor 2/Trustee 2/Director 2/Secretary
(you MUST circle one)

Date

 / /

Please print name

Signature - Investor 3/Trustee 3/Director 3
(you MUST circle one)

Date

 / /

Please print name

Signature - Investor 4/Trustee 4/Director 4
(you MUST circle one)

Date

 / /

Please print name

Regular Savings Plan Terms and Conditions

Our commitment to you

Drawing arrangements

1. By completing this form and the Account Opening Application Form you acknowledge the details of the OneVue Wealth Services Limited drawing arrangements. If we receive your application on or before the 1st of each month, deductions will commence from the 20th of that month or the month that you specify. Otherwise deductions will commence from 20th of the next month. If the 20th is a non-business day, then the deductions will occur on the next business day.
2. We will not change the amount or frequency of drawings arrangements without your prior approval.
3. We reserve the right to cancel the drawing arrangements if three or more drawings are returned unpaid by your nominated Financial Institution and to arrange with you an alternate payment method. Please note that we will pass on any charges incurred for failed transactions to your Portfolio.
4. We will keep all information pertaining to your nominated account at the Financial Institution private and confidential.

Your rights

1. You may terminate the drawing arrangements at any time by giving written notice to us. Such notice should be received by us at least 10 business days prior to the due date.

2. You may request a change to the drawing amount by notifying us in writing of your requirements no less than 10 business days prior to the due date.
3. Where you consider that a drawing has been initiated incorrectly you should take the matter up directly with us, or lodge a Direct Debit Claim through your Financial Institution.

Your commitment to us

Your responsibilities

1. It is your responsibility to ensure that sufficient funds are available in the nominated account to meet a drawing on its due date.
2. It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the Financial Institution where the account is based.
3. It is your responsibility to advise us if the account nominated by you to receive the drawings is transferred or closed.
4. It is your responsibility to arrange with us a suitable alternate payment method if the drawing arrangements are cancelled either by you or the nominated Financial Institution.