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<b>Email</b>	help@humanfinancial.com.au
<b>Website</b>	humanfinancial.com.au

Human Financial Managed Investments

# Change of investment details form

Issued by Human Financial Management Limited (ABN 99 067 544 549, AFSL 227677) as responsible entity for the Human Financial Managed Investments.

1 DECEMBER 2024

## Purpose of this form

Use this form to request certain changes to your investment instructions on your Managed Investments account.

If you need any assistance in completing this form, please call us on **1300 048 135**.

## Section 1: Your details (all investors to complete)

I want to:

Change my Default Money In Choice

Change my Default Money Out Choice

Change my Distribution Instructions

Start or amend a Regular Savings Plan

Start or amend a Fixed Payment Plan

Cancel my Fixed Payment Plan (complete sections **1 and 5 only**)

Cancel my existing Regular Investment Plan (complete sections **1 and 5 only**)

### 1.1. Account details

Account number or SRN

e.g. TINV / 123456, I00000123456

Title (Investor)

Mr Mrs Ms Dr Other

Gender

Male Female Other

\*Date of birth

DD MM YYYY

Given name(s)

Surname

Title (Joint Investor)

Mr Mrs Ms Dr Other

Gender

Male Female Other

\*Date of birth

DD MM YYYY

Given name(s)

Surname

## 1.2. Nominated bank account

We will use this account for any direct debits, distribution instructions or Money Out instructions that you set up as part of this form. Please include a certified bank account statement from the nominated account below, AND a current certified copy of either your passport or driver's licence. This should be included as an attachment with the completed form.

Name of Australian financial institution

Address of Australian financial institution

Account name

BSB number

Account number

/

### Direct debit request

I request and authorise Human Financial Management Limited (User ID number 101077) to debit my nominated bank account in accordance with the default and/or regular payment arrangement made between us as set out in this form.

I acknowledge that this debit will be made through the Bulk Electronic Clearing System (BECS) from my bank account held at the financial institution I have nominated in this form and will be subject to the terms and conditions of the Direct Debit Request Service Agreement. (For further information, refer to the section titled 'Direct Debit Request Service Agreement' contained in the Human Financial Managed Investments Additional Information Brochure available at [humanfinancial.com.au/documents](http://humanfinancial.com.au/documents).)

By signing and/or providing you with a valid instruction in relation to my Direct Debit Request, I understand and agree to the terms and conditions governing the debit arrangement between myself and Human Financial Management Limited as set out in this request and in the Direct Debit Request Service Agreement. I understand that my financial institution may charge me a fee each time a contribution is made and where a payment is dishonoured.

All bank account signatories must sign below.

Name of account holder

Signature of account holder

Date

DD MM YYYY

Name of account holder (if joint account)

Signature of account holder (if joint account)

Date

DD MM YYYY

## Section 2: Money In Choice

Use this section to tell us where you want to invest money coming into your account. You can nominate different instructions for your Default Money In Choice and/or Regular Investment Plan.

### 2.1. Default Money In Choice

Use this section to tell us how you want us to allocate money coming into your account (Default Money In Choice). You can nominate different instructions in **Section 2.2. Set up or change a Regular Investment Plan via Direct Debit** if you wish to set up a Regular Savings Plan.

Investment Option	Allocation (%)
	. %
	. %
	. %
	. %
<b>Total Default Money In Choice allocation</b>	100.00%

The total allocation must equal 100%.

### 2.2. Set up or change a Regular Investment Plan via Direct Debit

If you wish to set up or change a Regular Investment Plan, please nominate the date of payment (allow at least 6 business days).

Date of payment

Next available **OR** Nominated date **DD MM YYYY**

Frequency

Monthly **OR** Quarterly

Regular Investment Plan amount

\$ ,

Please select how you would like your money to be invested:

In accordance with my Default Money In Choice in Section 2.1. above, **OR**

In accordance with my existing Default Money In Choice, **OR**

In accordance with my instructions in the table below.

Investment Option	Allocation (%)
	. %
	. %
	. %
	. %
<b>Total Regular Investment Plan allocation</b>	100.00%

The total allocation must equal 100%.

## Section 3: Distribution instructions

Use this section to tell us where you want your distributions paid. Please ensure you have completed **Section 1.2. Nominated bank account** if you wanted to change your nominated bank account.

Investment Option	Distribution option	
	Reinvest	Paid into nominated account

## Section 4: Money Out Choice

Use this section to tell us where you want to deduct any money going out of your account.

### 4.1. Default Money Out Choice

Please make sure you provide your bank account details in **Section 1.2. Nominated bank account**.

**Note:** One-off withdrawals can also be specified at the time of withdrawal by completing the Application for Withdrawal Form.

Investment Option	Allocation (%)
	. %
	. %
	. %
	. %
<b>Total</b>	100.00%

The total allocation must equal 100%.

## 4.2. Fixed Payment Plan

If you wish to receive a regular fixed payment from your investment, please complete this section.

**Note:** Payments are typically made monthly on the 15<sup>th</sup> of each month.

Investment Option	Regular payment amount to be deducted from investment
	\$
	\$
	\$
	\$
<b>Total fixed regular payment</b>	<b>\$</b>

Payment instructions

To account nominated in **Section 1.2. Nominated bank account, OR**

To account nominated below:

Name of Australian financial institution

Address of Australian financial institution

Account name

BSB number

Account number

/

**Note:** To update your nominated bank account for Fixed Payment Plan, please include a certified bank account statement from the nominated account below, AND a current certified copy of either your passport or driver's licence. This should be included as an attachment with the completed form.

## Section 5: Acknowledgement and signature(s)

By signing this request form, I/we:

- confirm that I/we have received and read a copy of the Product Disclosure Statement and the Target Market Determination in respect of the selected Investment Options;
- declare that I/we have read the TMD and believe I am/we are within the product's target market and wish to proceed;
- declare that all the details given in this form are true and correct; and
- declare that, if signing under a power of attorney, I/ we verify that, at the time of signing, I/ we have not received a notice of revocation of that power.

We are committed to handling your personal information in accordance with the *Privacy Act 1988 (Cth)*. Read our Privacy Policy on our website at [humanfinancial.com.au/privacy](https://humanfinancial.com.au/privacy) for more information.

Full name (print clearly in block letters)

Type of investor

Individual      Joint investor 1      Director 1      Sole director and sole company secretary  
Trustee 1      Partner 1      Power of Attorney

Signature

Date

DD MM YYYY

**Note:** If signing under a power of attorney, please provide an original certified copy of the power of attorney.

Full name (print clearly in block letters)

Type of investor

Joint investor 2      Director 2      Company secretary  
Trustee 2      Partner 2      Power of Attorney

Signature

Date

DD MM YYYY

**Note:** If signing under a power of attorney, please provide an original certified copy of the power of attorney.

### Sending your form

Please send this form to us via email or mail.

#### Mailing address      Email address

Human Financial      help@humanfinancial.com.au  
Level 24, 68 Pitt Street  
Sydney NSW 2000

If you have any questions or need help, please call us on **1300 048 135**.