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<b>Address</b>	Level 24, 68 Pitt St Sydney NSW 2000
<b>Phone</b>	1300 048 135
<b>Email</b>	help@humanfinancial.com.au
<b>Website</b>	humanfinancial.com.au

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Human Financial Managed Investments

# Withdrawal form

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

9 JANUARY 2025

## Purpose of this form

Use this form if you wish to make a withdrawal from your Managed Investments account.

Terms and conditions for withdrawals are detailed in the Human Financial Managed Investments PDS available at [humanfinancial.com.au/documents](https://humanfinancial.com.au/documents).

Please complete this form in accordance with the instructions below.

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

## Instructions

### 1. Read and complete all sections in block capitals using a black pen

If you make an error while completing this form, please do not use correction fluid; simply cross out your mistakes and initial your changes.

### 2. Include scanned versions of your ID documents

If you haven't already done so, please include a certified bank account statement from the nominated account in section 3, AND a current certified copy of either your passport or driver's licence. This should be included as an attachment with the completed withdrawal form.

### 3. Send your withdrawal form to us

Please send this form to us via email or mail.

#### Email address

help@humanfinancial.com.au

#### Mailing address

Human Financial  
Level 24, 68 Pitt Street  
Sydney NSW 2000

## Section 1: Investor and Joint investor details

Account number or SRN

e.g. TINV / 123456, I00000123456

### 1.1. Investor details

Given name(s)

Surname

Date of birth

Contact phone number

DD MM YYYY

### 1.2. Joint investor details (if applicable)

Given name(s)

Surname

Date of birth

Contact phone number

DD MM YYYY

Account name (for Company, Trusts or Partnerships)

## Section 2: Withdrawal instructions

Use this section to tell us the relevant Investment Option and withdrawal amount for your request.

Investment Option	Withdrawal amount (one per Option)	
	Full withdrawal	Partial withdrawal
HF Cautious 30		\$
HF Prudent 50		\$
HF Assertive 70		\$
HF Aggressive 95		\$

Your withdrawal will usually be processed within 3 to 5 business days, and paid within 10 business days of us receiving your completed request and all required information.

When your withdrawal is processed, you will be sent a confirmation via email and/or post.

## Section 3: Withdrawal bank account

Note: we will not pay withdrawal funds to a 3rd party.

Please pay the withdrawal proceeds to (select ONE):

The bank account details on file

OR

To a new account, nominated below

**PLEASE NOTE:** As you are providing a new account, you must include a **certified bank account statement** when submitting this form. Funds cannot be paid to a nominated bank account until a certified statement is received by us to help protect your account.

Account name

BSB number

Account number

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## Section 4: Declarations, acknowledgements and signature(s)

By signing below you agree to be bound by any terms and conditions contained in the offering documents and constitution of the fund from which you are making a withdrawal.

Individual	Where the investment is in one name, the sole investor must sign.
Joint Holding	Where the investment is in more than one name, all investors must sign. If more than two signatures are required, please attach an additional page with the full names of each account holder, their signatures, and date.
Companies	Where the company has a sole director who is also the sole company secretary, this form must be signed by that person. If the company (pursuant to section 204A of the Corporations Act 2001) does not have a company secretary, a sole director can also sign alone. Otherwise this form must be signed by a director jointly with either another director or a company secretary. Please indicate the capacity in which the form is signed.
Trust	The trustee(s) must sign this form. Trustee(s) signing on behalf of the trust confirm that the trustee(s) is/ are acting in accordance with such designated powers and authority under the trust deed.
Power of Attorney	If signing under a Power of Attorney and you have not already lodged the Power of Attorney document, please attach a certified copy of the Power of Attorney annotated with the following: I/We attest that the Power of Attorney has not been rescinded or revoked and that the person who gave the Power of Attorney is still living.

By signing this request form, I/we make the following statements:

- 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](http://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.