







## STEP 5 Financial Institution Details

Please provide your nominated financial institution account details into which you wish your withdrawal proceeds to be paid.

**Please note that proceeds of regular withdrawals cannot be paid to third parties.**

Name of financial institution	<input type="text"/>
BSB	<input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Account number <input type="text"/>
Account name	<input type="text"/>

## STEP 6 Signature(s)

I/We wish to commence a RWF or change/cancel my/our existing RWF as detailed in this Regular Withdrawal Form.

I/We declare that:

- I/we have read and understand the tax implications of withdrawals made from my/our WealthBuilder account(s) as detailed in the IOOF WealthBuilder PDS (and any Supplementary PDS);
- all details provided in this Regular Withdrawal Form are true and correct and I/we undertake to inform IOOF of any changes to the information supplied as and when they occur; and
- I/we consent to the collection, use, storage and disclosure of my/our personal information by IOOF in accordance with the Privacy Act 1988 and acknowledge that a copy of the IOOF Group Privacy Policy is available from [www.ioof.com.au](http://www.ioof.com.au) or may be obtained by calling a Client Services Officer on 1800 002 217.

### WHO NEEDS TO SIGN?

All original investors registered on the account must sign this section unless previous authority has been provided in writing and accepted by IOOF, such that:

- a single joint investor can sign on behalf of a joint investor account;
- a representative nominated to act and operate on the account can sign on your behalf \*; or
- a Power of Attorney can sign on your behalf \*, in which case a certified copy of the Power of Attorney must have been previously provided to IOOF and retained on file for us to process your regular withdrawal instructions.

\* If signed by a nominated representative or Power of Attorney, please ensure that the 'Nominated Representative or Power of Attorney' section in **Step 1** is completed.

### Power of Attorney

If signed under a Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that power.

If the Power of Attorney has not previously been registered with IOOF, please attach a certified copy of the Power of Attorney and the required proof of identification documents in accordance with AML/CTF Law. For further information, please refer to the 'Completing Proof of Identity' on our web site at [www.ioof.com.au](http://www.ioof.com.au), or alternatively call one of our Client Services Officers on 1800 002 217.

### Corporate Investors

This Regular Withdrawal Form must be signed either:

- by the Representative previously nominated for your IOOF WealthBuilder account;
- under common seal;
- by two directors or a director and company secretary; or
- by the sole director (where applicable).

> **Step 6** continued overleaf

